

## 30 Reasons To Upgrade

**A**re you still running on an older version of Sage ERP MAS 500? Studies show many customers choose not to upgrade due to concerns over the cost and effort involved. However, because every release is designed to streamline workflow, save you time and money, and improve customer service, you can experience a fast return on your upgrade investment. In this article, we will cover the top 10 features of the last three releases; all 30 are included in the most recent release—Version 7.3.

### Version 7.3—Top Ten Enhancements

Here are just the top 10 enhancements introduced in the most current release of Sage ERP MAS 500:

1. The new Credit Card Processing module is free when you use Sage Payment Solutions as your credit card processor. Credit card transactions are enabled in several places throughout Sage ERP MAS 500 Version 7.3—they can be initiated and managed from within Sales Order, Accounts Receivable, and Cash Management.
2. Significant performance improvements in data entry, processing, posting, and reporting improve productivity.
3. A streamlined Sales Order processing workflow improves customer service and productivity. The new capabilities include:



- Ability to print an invoice before committing shipments so that an invoice can be included in a shipment. For counter sales, it can be printed and handed to the customer.
  - Ability to process shipment commitments after business hours.
  - Flexible credit card payment options that support a customer's preferred payment method.
  - Updates made to Ship To, Ship Via, and Delivery Method fields in the order header optionally cascade down to all open sales order line items, eliminating the need to update lines items individually.
4. The inventory physical count process becomes faster and more accurate with a new grid entry, expanded item selection criteria, and sort order control. You also can select individual list items to count and save count selection settings for future use.
  5. Several new Business Insights Explorer views allow you to view pending and posted inventory transactions.
  6. Vendor and customer documents can be sent electronically in PDF format.
  7. Make payments electronically using the Automated Clearing House (ACH), and avoid check fraud with Positive Pay.

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8. The updated Desktop offers faster access to the tasks you use most with a Recently Accessed Tasks window. You can personalize the Tasks Explorer Bar, change the order of the module menu groups, and hide or show groups on the menu.

9. Customer and vendor records can be merged easily to eliminate duplicates or consolidate entities.

10. Multiple shipments can be included on a single invoice to simplify billing and reduce paperwork.

### Version 7.2 Top 10 Enhancements

Here are the top 10 enhancements added in the Version 7.2 release of Sage ERP MAS 500:

1. Business Insights Dashboard was introduced to provide you with the vital information you need to stay on top of your business. Up-to-date sales statistics, key accounting data, industry news, and competitive intelligence all are available in one location.

2. Useful new Business Insights Explorer Views were added, such as the *Where Serial Number Used* preview that allows you to immediately identify where a given item serial number was used in your business operations.

3. Data Import Manager was introduced, allowing database administrators to use a powerful mapping wizard to easily configure one-time or regularly scheduled imports into a wide variety of Sage ERP MAS 500 transaction formats.

4. The option to Pick by Order or Shipment was added, allowing you to complete urgent orders first without completing an entire pick list.

5. A Memo Management option was added to the Sage ERP MAS 500 Office toolbar. Created memos are automatically assigned to the voucher,

customer, or invoice.

6. Business Insights Explorer now includes a new *Active Memos* preview for the most common memos such as Vouchers, Invoices, Work Orders, Projects, Purchase Orders, and Sales Orders.

7. Ability to access Office Template creation from within Microsoft Word was added.

8. In addition to providing complete Microsoft Office 2007 support, Sage ERP MAS 500 Office becomes a generic feature, available in all data entry tasks.

9. Online tutorials and extended Help options offer comprehensive training and search capabilities. HTML help and multimedia tutorials help new users learn how to handle common tasks and functionality.

10. Sage ERP MAS 500 takes advantage of the latest .NET and SQL capabilities.

### Version 7.05 Top 10 Enhancements

Here are the top 10 enhancements added in the Version 7.05 release of Sage ERP MAS 500:

1. A streamlined grid-based entry provides a heads-down approach to order processing. Sales Order Entry can be tailored to match internal procedures using a built-in customization interface where fields can be added and moved by company, group, user, or site—offering complete flexibility and control.

2. Extensive pick, pack, and ship workflow enhancements are added, including automatic generation of shipments from picking, and the ability to skip the picking confirmation and shipment editing tasks by completing edits for lots, serials, and bins from within picking.

3. An improved StarShip interface eliminates the need for warehouse personnel to manually enter package dimensions.

4. Streamlined Drop-Ship Processing allows you to select the Purchase-From Vendor in Sales Order Entry.

5. Gross Profit Display allows you to optionally display the calculated gross profit for each line on an order, and receive a warning when profit dips below your acceptable level.

6. With Order Copy you can create new orders by copying from an existing order. You can edit and re-price the order as needed.

7. Promotional Pricing allows you to configure date-specific promotions for items, product lines, and other subgroups of inventory with either fixed or percentage-based discounts based on price or quantity ordered.

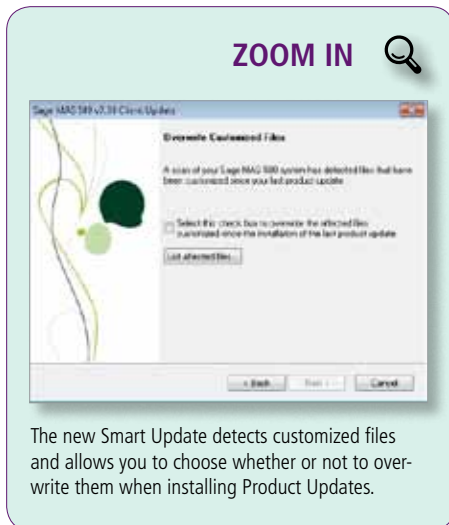
8. Real-Time Inventory – batch processing is removed from transfer shipments, customer shipments, and customer returns to keep more accurate inventory levels throughout the day.

9. Customized Sales Order Entry screen allows you to choose which fields should be included or excluded from line item grid entry, as well as which fields should be delegated to the miscellaneous tab. Plus, columns within the grid entry can be frozen to help you retain visible context as you scroll from left to right.

10. Credit Management – an optional credit check routine will place orders on credit hold and lift credit holds from orders for customers with resolved credit issues.

Remember all 30 of these features are included in the most recent Version 7.3. Give us a call with your questions or for help in planning your upgrade. ✨

# Smart Updates And Helpful Hints



The new Smart Update detects customized files and allows you to choose whether or not to overwrite them when installing Product Updates.

## New Smart Update

As part of the new product strategy for Sage ERP MAS 500 implemented earlier this year, Product Updates for the software now include significant workflow and usability enhancements in addition to program corrections. In order for customers to more easily take advantage of these enhancements, Sage has made the installation logic within the update smarter.

The Smart Update process comprises two components. First, it only overwrites files that have changed. The software will review the current version that is installed, and if a file is at the same level as the Product Update, it will not change it. This provides you with a smoother, faster install with less possibility for errors.

Many Sage ERP MAS 500 customers have made customizations to their software, and are reluctant to install Product Updates because they may inadvertently overwrite one of their customizations. The new Smart Update now checks all of the files it is going to overwrite to see if there are any customizations. If customizations exist, a window is displayed during the installation process. You will be able to view a list of the files that have been

customized, and choose whether to overwrite them during the installation of the Product Update.

The new Smart Update process means that you can install Product Updates with confidence and quickly use the new features. The Smart Update process has been added to Product Updates beginning with Product Update 3 for Sage ERP MAS 500 7.3. Please let us know if you have any questions about the Smart Update process. ✨

## Helpful Hint: Adding Formulas To Business Insights Analyzer

It is useful to add formulas to Business Insights data for use in pivot-table calculations when you transfer your data to Microsoft® Excel®.

Here is how you can add a formula column to an Analyzer View based on the values in other columns:

1. Click the *Calculated Totals and Fields* button on the Analyzer menu bar.
2. At the *Commands and Options* window, either select the column to use in the calculation or create a new column.
3. Click the *Calculation* tab.
4. Select the fields to be used in the calculation, and then click the *Insert Reference To* button to pull in the fields to generate the formula. For example, to create a net profit calculation, generate the following formula: Sum of Net Sales / Sum of Net Sales Qty.
5. Click the *Change* button when calculations are finished.
6. Click the *Caption* tab to modify the column name if desired.

Please call us with your questions. ✨

## Helpful Hint: Making Demand Adjustments In Inventory Replenishment

You can make adjustments to Item Demand to alter the Recommended Replenishment Quantities as follows:

1. Open Sage ERP MAS 500\Inventory\Management\Activities\Replenish Inventory\Demand Adjustment.
2. Select the warehouse and item that you would like to enter or make adjustments for.
3. Select either *past* or *future* adjustment. The adjustments are separated by periods and are based on the inventory calendar. The current inventory period is read from Inventory Management and is set in IM Options.

### Things to keep in mind:

- Positive or negative adjustments can be entered to calculate the Net Usage for the item.
- The system uses the Net Usage in the calculation of future demands that include the specific period.
- The Actual Usage field is based on sales. The rough calculation is Quantity Sold minus Returns quantity. To find the sales for an item, you can use the Sales Order Lines or the Inventory Transactions, Explorer view. You can filter the view by transaction type to find the sales (transaction type = 810) and returns (transaction type = 811).

Please give us a call with any questions about this hint. ✨



## IN THE SPOTLIGHT:

### The Benefits Of Automating Your Warehouse

The heart and soul of a successful distribution operation is knowing exactly where your products are stored and the quickest way to retrieve them. The efficiency with which you manage picking, packing, shipping, and receiving has an immediate impact on your bottom line. One way to obtain a big gain in efficiency is to implement a wireless data capture solution in your warehouse. In this article we discuss what to look for in a warehouse automation solution to maximize your warehouse operational efficiency.

#### Automation Efficiencies

In many warehouse situations, data is manually entered into the computer, while warehouse workers are kept busy picking orders and putting stock away. Situations can change rapidly on the warehouse floor, and the data entered manually often is outdated by the time it is input. Lack of real-time information about stock on hand makes it difficult to provide good customer service. In an automated warehouse, all items are scanned as they move in, out, and around the warehouse. The scanned data is downloaded directly to the computer system via radio frequency (RF) to provide real-time information about the product's location. When an order comes in, the order taker need only access the computer records to see how much of any given product is in the warehouse and pinpoint exactly where it is located for the order picker.

Wi-Fi and RF networking gain popularity

every day. Coffee shops, airports, hotels, libraries, even our own homes are going wireless. Large warehouse operations have taken advantage of these efficiencies for years. Today the wider availability of Wi-Fi systems has made RF technology and warehouse automation more affordable for smaller distributors.

#### How Warehouse Automation Works

Your warehouse workers use hand-held devices to scan barcodes while performing shipping and receiving tasks. The information is beamed via the radio frequency (RF) network to the server that handles the transmission of information between the handheld device, your ERP system, and barcode label printers. A well-integrated warehouse automation system can validate and post data into your ERP system in real time, so that you have up-to-the-minute product quantity and location information.

#### The Infrastructure

To make sure the wireless system is available in all areas of the warehouse, a site survey of the warehouse and other RF-enabled areas is recommended for areas greater than 30,000 square feet to determine exact requirements for access points, antennas, cables, and so forth. The site survey will result in a list of all required components and exact placement of the access points and antennas in the warehouse. When purchasing

hand-held barcode reader devices, keep in mind they need to be the rugged type that can survive a five-foot drop. Barcode label printing needs to be part of the solution as well. Your warehouse automation system should be able to print barcode labels in flexible formats.

Solutions are available that integrate smoothly with Sage ERP MAS 500. Give us a call to discuss your warehouse automation options. ✨

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