

STAR-INFO

NEWSLETTER for Sage ERP MAS 90 and 200

Sales Order Enhancements

Version 4.5 Offers Extensive New Capabilities

The Version 4.5 release of Sage ERP MAS 90 and 200 is due out late this summer and is packed with new features designed to smooth your workday. In this article we take a closer look at the enhancements in the Sales Order module, including new capabilities in pricing, commissions, and lot/serial distribution, as well as additional flexibility in the integration between the Sales Order and Job Cost modules.

New Pricing Features

Price Level By Customer And Product Line

In Version 4.5 price levels by customer have been enhanced to allow you to establish default price levels for each customer by product line. This will make it easy to reward customers who purchase a large quantity of many items across a product portfolio, not just for a large quantity of an individual item. Because discounts can be pre-set by price code or by ship-to code, order entry staff will not be burdened with having to refer to additional documentation to determine the correct pricing discounts for customers. This enhancement makes it easier for you to reward your best customers and keep them loyal.



Pricing Flexibility For Total Item Quantities

Sage ERP MAS 90 and 200 always has had the capability to set discount pricing for large quantities of a specific item. In Version 4.5 you will be able to set discounts based on both groupings of items and the item totals. Discounts can be based on the total of products in a product line, or the total for specific groups of products in a product category, or by the

total sum quantity on the order.

This flexibility will be especially useful if your company offers many different colors and sizes of the same items. Perhaps you would like to run a special on widgets and widget accessories. You may stock the widgets in four different sizes and 10 colors. Accessories fall into six different product groups and number in the hundreds. Using Sage ERP MAS 90 Version 4.5, you would be able to discount the

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entire widget product line by 10 percent, set a 20 percent discount on two of the accessory item categories, and choose to discount the total order by an additional 5 percent if the total items ordered reach a certain level.

Advanced Distribution Of Lot And Serial Numbers

With Version 4.5 of Sage ERP MAS 90, you will be able to assign specific lot or serial numbers when you first create a Sales Order, rather than when invoicing. This allows you to reserve specific lots for your best customers. Or, if a customer has ordered from one lot, and wants to reorder more from that same lot, you will easily be able to accommodate them. If, for example, a granite supplier sells different types, colors and grains, and allows their customers to choose a specific piece to be used for a remodeling project, that item can be reserved for that specific customer. The selected lot and serial numbers can be printed on the sales orders and picking sheets for more reliable processing and communication. The new Lot and Serial Number Distribution option is enabled on the Line Entry tab of Sales Order Options.

Greater Flexibility In Salesperson Commissions

Commission Rate Table By Salesperson, Customer, Item

A commission rate enhancement in Version 4.5 allows you to setup salesperson commission rates by any combination of salesperson, customer, item, and effective date. For organizations with different pricing tiers for specific customers, a large number of items, and with multi-tier commissions, these new commission

rate tables will provide an automatic method for ensuring your salespeople are paid correctly. The rate tables are easily set up and revised through a new maintenance program. The rates you assign will override any commission rates setup for items in Item Maintenance, or the commission rate entered for the invoice.

Split Commissions By Customer

Currently in Sage ERP MAS 90 and 200 you can split commissions between two or more salespeople, such as inside and outside sales, or salesperson and sales manager. With the Version 4.5 release, the percentage splits and specified sales personnel can be set for each individual customer. After the default split commission has been set up for a customer, this commission split will default automatically, rather than having to enter this information each time a sales order or invoice is created for that customer. The new default split commission feature supports a primary salesperson plus up to four additional salespeople.

Enhanced Sales Order Integration With Job Cost

A series of new features within the Sales Order to Job Cost integration allows you to specify how revenues and costs are posted to the G/L, and set Job Cost related defaults to save time in order entry. These capabilities are configured on a new Job Cost tab in Sales Order Options.

The new revenue and cost posting options are found in three areas. You can:

- Post Sales Order invoice costs to job costs, amounts only, or amounts and units.
- Have amounts update the Estimate fields in Job Cost.

- Choose to post drop-ship costs to Job Cost; the choices are Yes, No, and Purchase Order only.

With Version 4.5 you also can elect to include the job number and description in the G/L posting comment for work in process, cost of goods, revenue, and expense accounts.

New inventory-related options allow you to relieve inventory quantities using the Product Line G/L accounts for sales and cost of goods, rather than the Job Cost Job Type accounts, when entering items for jobs in Sales Order. You also can choose how sales kits will appear on job invoices.

Other new features give you more control in sales order and invoice entry. You can choose to validate that the customer entered is the correct one for the job. You can select which cost types can be used in Sales Order, and you can choose to automatically change the Job Status to Complete during invoicing in Sales Order. This is a useful feature if you only invoice jobs once. To further save time, you now can set a default cost code and cost type for a customer. Invoice History Inquiry now displays the full job number and description as well.

Give us a call with your questions, or to discuss your upgrade to Version 4.5 of Sage ERP MAS 90 or 200. ✨

Integrated CRM Promotes A Holistic Customer View

With the release of Sage ERP MAS 90 and 200 Version 4.5, all customers on a current maintenance plan will be receiving a SageCRM server license and one user license at no additional charge. Sage EES customers will receive an additional user license as a benefit of their plan.

The Benefits Of Integration

Integration of customer data across your organization can transform your business and help your staff work together more efficiently and cost effectively. Time that your staff previously spent re-entering data is saved, and your team can accurately identify customer requirements and fulfill them quickly and profitably. Integration with your financial system allows accounting staff access to critical customer information, and cash flow is improved as your credit and collections and sales teams work in unison to collect outstanding balances.

SageCRM is more than just a great productivity tool for your sales and marketing staff. Integrating SageCRM with Sage ERP MAS 90 and 200 supports your organization in managing the entire customer acquisition cycle; from initial marketing campaigns and lead generation, through the process of quoting and receiving orders, and finally to fulfillment and customer service.

SageCRM Features Overview

SageCRM is designed to help you build long-lasting customer loyalty and generate repeat sales. Let's look at the key capabilities.

Sales Force Automation

Visual tools make it easy for your sales team to manage current and historical account details, activities, and

opportunities. Built-in tools let you automatically distribute leads to your sales professionals based on criteria you define. Point-and-click reporting and graphs give sales teams access to real-time data for on-the-spot analysis and evaluation.

Marketing Automation

Powerful yet easy-to-use marketing tools make it a simple matter to schedule and track marketing activities within a campaign. Each detail of a campaign and the results can be made visible, providing a single source of prospect information to eliminate guesswork.

Customer Care Automation

Real-time access to a complete view of customer data helps you provide better customer service and build lasting customer relationships.

Microsoft Outlook Integration

SageCRM is tightly integrated with Microsoft® Outlook® and Exchange. Changes made in Outlook are synchronized to ensure they are appropriately reflected in SageCRM.

SageCRM Version 7.1

Now more than ever, companies need to maximize workplace effectiveness, drive staff productivity, and put the customer at the heart of their business processes to stay ahead of the competition. SageCRM Version 7.1 features are designed to help your organization thrive. We highlight some of the new functionality below.

Sage E-Marketing For SageCRM

Version 7.1 includes a fully integrated e-Marketing system for creating targeted email marketing campaigns. You can create drip marketing campaigns quickly and

easily, and automatically track open, click, and bounce rates. A simple three-step wizard guides you through the process of creating an e-marketing campaign, and a selection of 90 templates helps you get started quickly. Follow-up call lists automate the connection between email and telesales. The e-Marketing system requires an additional subscription.

Total Campaign Management

Campaign Management now includes full campaign workflow so organizations can map campaigns to their business processes for consistent execution. Your marketing manager can execute multi-channel marketing campaigns, track results, and then copy and reuse the campaigns that provide the best results.

Interactive Dashboard Enhancements

With Version 7.1, you can create tailored dashboards for key accounts in SageCRM; re-size and reposition gadgets to view the data in the way that best suits your needs, and drill down to detail when needed.

Communications Management Enhancements

New real-time synchronization between SageCRM and MS Exchange delivers a seamless calendar management experience in Version 7.1. You will appreciate your up-to-date appointments, tasks, and contacts within SageCRM, and on your smartphone, laptop, or desktop PC.

New Report Charts

In SageCRM Version 7.1 your at-a-glance business insight report charts and graphics make it easy to make comparisons and identify patterns and trends in your data for better decision support. ✨

Tips And Tricks

Linking SageCRM Salespeople To Multiple Divisions

Note: You must have Sage ERP MAS 90 and 200 Version 4.3 with Service Update 8 or greater to link SageCRM salespeople to multiple divisions in Sage ERP MAS 90 and 200. This procedure assumes you are starting with unlinked Sage ERP MAS 90 and SageCRM.

Step One: Setup Sage ERP MAS 90 Salespersons and SageCRM user IDs

We will use salesperson Susan Maye as our example salesperson.

1. In SageCRM, create user IDs for all salespeople (For example: MayeS).
2. In Sage ERP MAS 90 or 200, create user logons for all salespeople (For example: SusanM).

Note: If integrated logons are used, SageCRM user accounts must match Sage ERP MAS 90 user logons. In our example, we would use MayeS for both user accounts.

Step Two: Relate the SageCRM user IDs and Sage ERP MAS 90 user logons in Salesperson Maintenance

1. Expand Accounts Receivable and Setup. Double-click Salesperson Maintenance.

2. Create a salesperson record for each division applicable to that salesperson.

Note: The salesperson number does not need to be the same in each division, but it may be easier to track the accounts if they are. For example:

Division 1: Salesperson No = 01-1000

Division 2: Salesperson No = 02-1000

3. Select the *Relate To SageCRM* check box. Match the SageCRM user ID and the Sage ERP MAS 90 user logon. For example:

- SageCRM User ID = MayeS
- Sage ERP MAS 90 user logon = SusanM

Note: The same SageCRM user ID and Sage ERP MAS 90 user logon combination must be used when relating the same salesperson in other divisions.

Step Three: Link the companies

1. In SageCRM, click the *Maintain Relationship* button.
2. Click the *Next Available Customer Number* button. The division defaults to the first division the salesperson is linked to in Salesperson Maintenance and assigns the next customer number from Account Receivable Options.
3. Edit the division and customer numbers manually if desired.
4. Accept the link.

Note: If the division and customer number is manually entered and currently exists in Sage ERP MAS 90, but is not linked to a SageCRM company, the link will be made to the existing customer and data will be synced based on the SageCRM company data.

How To Delete A Credit Card From Customer Maintenance

Note: Credit cards with current activity cannot be deleted.

1. Open Customer Maintenance, and

select the customer.

2. Select the 'Additional' tab.
3. If the card is the Primary Credit Card, highlight the number in the **Number** field, press the **Delete** key and then press **Enter**. Accept the change. Primary credit cards cannot be deleted unless this is done.
4. From Customer Maintenance, click the Credit Cards button to access Credit Card Maintenance.
5. Select the credit card number.
6. Click the Delete button and Accept.

Please call us if you need assistance. ✨

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