

Sage 500 ERP

What's New in Sage 500 ERP 7.4?

Inspired by You—Improvements for All

Sage 500 ERP (formerly Sage ERP MAS 500) Version 7.4 focuses closely on providing value to every part of your business, leveraging the latest in Microsoft® SQL Server and .Net technology, reducing total cost of ownership, and improving usability. From core financials, insights, and analytics to replenishment, distribution, and manufacturing, Sage 500 ERP Version 7.4 is loaded with new features and improvements. Features and functionality include some of the most requested customer enhancements; improve flexibility and accuracy in costing and materials management; simplify and improve posting routines; provide easier access to key data; and deliver many other usability improvements.

The list of 7.4 enhancements is led by reporting, deployment, usability, and analytics improvements designed to put your business-critical information on your desktop or mobile device anytime, anywhere. Additionally, the new web capabilities in version 7.4 make it easier for your customers and remote staff to place and track orders online with 24/7 access from any location with Internet access.

Intelligence, Analytics, and Web Capabilities

Business Intelligence

Sage 500 ERP Business Intelligence, originally introduced as a replacement for the retiring Microsoft® FRx financial reporter, offers a powerful and easy-to-use graphical interface to create custom financial and management reports. Get up and running sooner with out-of-the-box reports. Use the automation capabilities to deliver reports and sophisticated, customizable dashboards when you need them without user interaction. And you can even access data from sources outside Sage 500 ERP for complete up-to-the-minute insight to every aspect of your business.

Business Insights Explorer

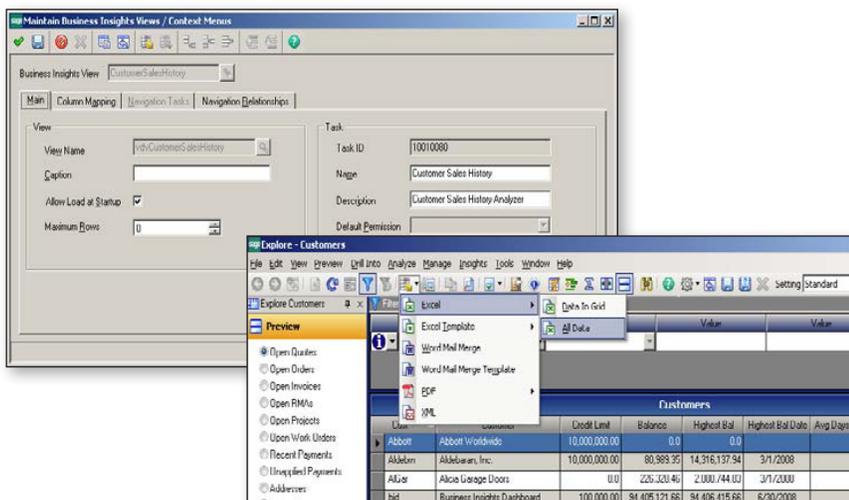
Version 7.4 delivers improved functionality as well as new standard views to help you access and analyze your data more efficiently with new features including:

- **NEW** Top "N" capabilities and improved performance using the Maximum Rows parameter to display top customers, vendors, or items.
- **NEW** export options that allow you to export only the data displayed in the grid or all data, to either Microsoft® Excel or PDF. New Landed Costs Transactions view in Receipt of Goods that provides detailed allocation and costing information to improve the accuracy and flexibility of total cost of goods received.
- **NEW** Unit of Measure view in Inventory Transactions that provides visibility to conversion calculations.



BENEFITS

- View key performance indicators anywhere, anytime with advanced intelligence, analytics, and web capabilities
- Improve productivity and customer satisfaction with simplified customer returns
- Increased flexibility and accuracy with override capabilities and new options for vendor selection, landed costs, and unit of measure conversions
- Reduce down time and simplify staging and posting with preferred bins, backflush material issues, production and progress returns, and redesigned posting process
- Get the most from your software investment with the latest technology platforms



eBusiness Suite for Sage 500 ERP

Version 7.4 heralds the introduction of new web capabilities to replace the retired eCustomer, eSalesforce, and eOrder modules with eBusiness Suite for Sage 500 ERP. The eBusiness Suite solution serves as a B2B and B2C interface as well as a sales team, CSR, and remote location alternative interface to Sage 500 ERP. This intuitive extension to Sage 500 ERP in the form of a browser-based solution empowers your customers, salespeople, and customer service representatives to increase their efficiency and productivity in order to boost sales.

- Customers, salespeople, and customer service representative can use your online store to place orders and get accurate and up-to-the-minute information about items, prices, inventory, account status, and expected delivery dates.
- Fully compliant Credit Card processing capabilities enable payment processing through the integration with the Sage 500 ERP Credit Card module in version 7.4.
- B2B and B2C capabilities allow you to conduct internet transactions that best fit your business need.
- When functioning as a remote interface for Sage 500 ERP, users can view customer orders, shipments, invoices, payments, and back-orders, making it the ideal solution for salespeople or customer service representatives who require a comprehensive overview of customer accounts to respond quickly to customer requests and follow up on orders or payments due.
- Advanced filtering capabilities limit access such that a salesperson or customer service representative views only his own accounts, items, or product lines.
- eBusiness Suite also offers streamlined RMA entry and Autoship functionality.

Accounts Receivable Improvements

Overpayments and customer refunds pose a special challenge in any business. Tracking overpayments and the resulting negative balance is an important feature in any business management software. Overpayments need to be clearly identified and included in customer inquiries and statements as well as on receivables reports. And ultimately, when there is no other option than to cut a refund check that process needs to be as painlessly as possible. Now it is.

Overpaid Invoices

Version 7.4 allows you to record a customer's overpaid invoice in either Cash Receipts or Apply Payments and Memos, then track and apply the negative balance just as you would a credit memo. The overpayment is tracked using the original invoice number for easier identification and you can view the overpayment from Print/Re-Print Invoices, the Ledger tab in Customer Status, on customer statements, and on the AR Aged Receivables and AR Trial Balance Reports.

Tran ID	Application	Tran Date	Due Date	Amount	Discounts	Balance
0000000052-IN		02/07/2007	03/09/2007	11,076.00	0.00	11,076.00
	002-CR	02/28/2007		-11,076.00	0.00	0.00
	002-RV	02/28/2007		-11,076.00	0.00	0.00
0000001008-IN		01/20/2008	02/19/2008	4,491.90	0.00	253.20
	1022-CR	06/30/2008		-4,238.70	0.00	0.00
0000001009-IN		01/20/2008	02/19/2008	4,238.85	0.00	-976.45
	1022-CR	06/30/2008		-5,761.30	0.00	0.00
0000000970-IN		03/06/2008	04/05/2008	7,151.37	0.00	1,151.37
	93849-LR	06/02/2008		-5,000.00	0.00	0.00
	38979879-CR	06/02/2008		-1,000.00	0.00	0.00
0000001050-CM		03/21/2008	03/21/2008	-253.20	0.00	-253.20

Customer Refunds From Cash Receipts

Customer Refunds in version 7.4 are as easy as one, two, three. Instead of accessing multiple modules with numerous steps, you can now accomplish the entire task in Enter Cash Receipts.

1. Designate the type of refund you wish to issue.
2. Select the invoices, debit memos, overpayments, and credit memos you want to use.
3. Print the refund check directly from the Process Cash Receipts panel.

It's as simple as that. You can enter a check number to record a handwritten check or leave the check number blank to issue a system-generated check. Either way, the process is simple and straight forward. A check register is included in the posting reports for audit purposes.

Sales Order Improvements

Negative line items have been prohibited on Sales Orders in Sage 500 ERP. Many of you expressed the need to be able to include a negative line item on a sales order to track coupons, rebates, purchasing incentives, or other noninventory items. Version 7.4 introduces the ability to include those line items for whatever your business demands. Simply select the noninventory item, enter the quantity ordered as a negative value, and Sage 500 ERP takes care of the rest.

Item	Qty Ordered	UOM	Unit Price	Sales Amt	Delivery
1 RocketTax	1	Each	149.990	149.99	Ship
2 QuickTax	1	Each	153.000	153.00	Ship
3 Training	-1.0000	Each	150.000	-150.00	Ship

Replenishment Improvements

Inventory Replenishment—whether you use Replenish Inventory or Material Requirements Planning (MRP), balancing the quantity on hand to meet all of your demand without overstocking requires flexibility and accuracy. Add to that the recent economic challenges and tighter margins—and poor inventory management can bring a company to its knees.

Sage 500 ERP Version 7.4 includes key enhancements to replenishment and procurement tasks that allow greater flexibility, and improve costing capabilities to ensure you can take advantage of the best cost available and capitalize all of the costs associated with just in time stock management.

Buyer and Vendor Override Capabilities

Prior to Version 7.4, buyer and primary vendor selection as required fields in Warehouse Replenishment determined the buyer and vendor selection on Suggested Orders in Process Replenishment Orders or MRP. This requirement resulted in many companies either not utilizing the replenishment capabilities available or artificially creating purchase product lines for each buyer and vendor rather than by logical product grouping.

With the improved functionality in Version 7.4, the buyer and primary vendor are no longer required fields in Warehouse Replenishment. Buyer and Primary Vendor selection can now be determined in any the following ways:

- Select in Set Up Warehouse Replenishment by Purchase Product Line and Warehouse
- Override or select in Maintain Inventory for individual items
- Override or select on an individual Suggested Order in Inventory Replenishment or MRP

Once implemented, Sage 500 ERP Version 7.4 allows you to shop for the best price and delivery, and autogenerate Purchase Orders for the vendor that best meets your demands.

Landed Cost Improvements

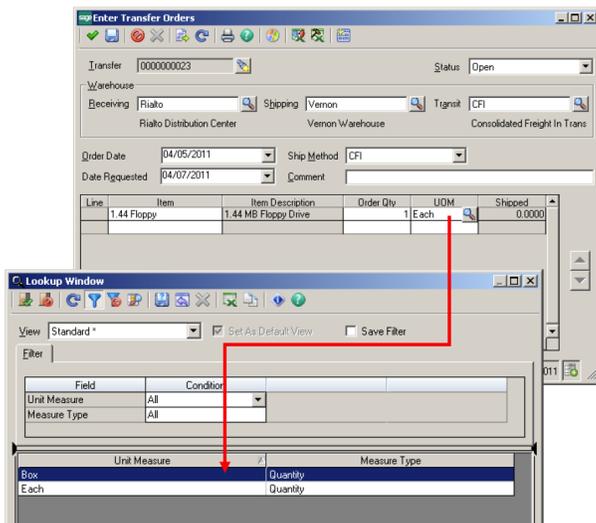
Bringing stock in to your warehouse often includes additional costs not invoiced by the vendor. Furthermore, it is often preferable to include the freight costs billed by the vendor in the item cost rather than absorb those costs as a direct expense. Sage 500 ERP Version 7.4 adds options and tasks to improve the accuracy of those costs while adding flexibility and making it easier to create, apply, and override costs during Receipt of Goods. Take advantage of improvements like:

- **NEW** option to apply freight to items in Set Up AP Options and Set Up PO Options.
- **NEW** flexibility to establish landed costs independent of a vendor or item.
- **NEW** options in Set Up Landed Costs to establish the type of landed cost, whether to apply to an individual line or an entire receipt, and the allocation method.
- **NEW** allocation methods for costs applied to an entire receipt by percentage of total cost, quantity, weight, volume, or manual.
- **NEW** Enter Landed Cost task in Enter Receipt of Goods to create, apply, or override the Landed Cost code, allocation method, or cost.

Unit of Measure Improvements

In version 7.4, Sage 500 ERP delivers a whole new approach to how UOM conversions are calculated, stored and displayed. Key improvements include:

- **NEW** optimized SQL data type with expanded decimal precision in data storage minimize rounding errors.
- **NEW** user-defined rounding methods for base units of measure add flexibility and improve accuracy.
- Improved conversion factor assignment to avoid infinite decimal precision calculations.
- **NEW** retention of conversion factors with transaction records improve tracking.
- **NEW** "Auto adjustments" to prevent "invisible" quantities Improved physical count transactions store quantities in both expanded and displayed decimal precisions to improve accuracy.
- **NEW** option to choose an alternate unit of measure beyond the Standard increases flexibility on various reports.
- **NEW** ability to perform transfers in any unit of measure makes workflow easier.
- **NEW** Unit of Measure Business Insights View provides visibility to conversion calculations.



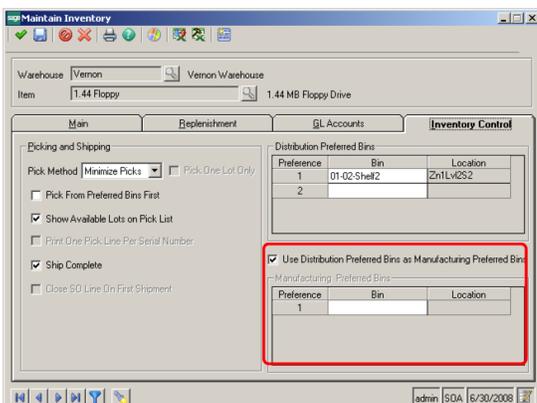
- Flexibility and reliability in unit of measure conversions are vital to effective inventory management. Decimal precision on fractional quantities can cause errors and frustration during picking, shipping, and inventory cycle counts. The unit of measure (UOM) used to purchase an item does not always match the UOM used in the warehouse, on the production floor, or the way a customer purchases the item. So . . . in distribution and manufacturing, unit of measure conversions are a way of life and the accuracy and flexibility in determining the UOM that's used and the calculation of the conversion are critical to the success of your business.

Manufacturing Improvements

Manufacturers share many of the requirements expressed by distributors regarding the need for flexibility and reliability in the procurement process and the need for accurate quantities based on reliable unit of measure conversions. And yet, beyond those features manufacturers need features specific to the manufacturing process. They need production operations to run smoothly, with minimum down time at maximum efficiency to manage costs and deliver finished goods on schedule. Improvements in Sage 500 ERP Version 7.4 include new features and tasks to address manufacturers' unique requirements.

Manufacturing Preferred Bins

When the staging area is empty, the production line comes to a screeching halt! Sage 500 ERP Version 7.4 includes capabilities to help avoid downtime due to inefficient materials staging . . . specifically the ability to define manufacturing specific bin preference. In prior versions, bin preferences were defined that applied to both distribution and manufacturing picking. For many, a single preference is sufficient. However, for manufacturers whose parts are also distributed as replacement parts or stand-alone stock a single preference may not be enough.



In Version 7.4, we added the ability to choose. You can continue to use the same bin preference for both distribution and manufacturing, or establish distinct preferences based on usage. You can maintain distinct bins just for materials demand so that your production floor is never in the position of running out of raw materials, and maintain a separate supply just for distribution.

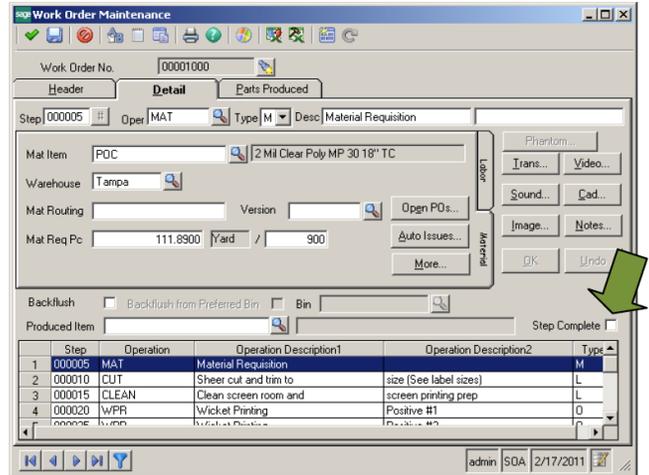
Work Order Step Complete Flag

The replenishment calculation for manufacturers must account for materials committed to work orders in progress. But what happens when plans change? It is not uncommon for manufacturers to find themselves in the position of not using all of the planned materials on a step, either due to a cancellation or change in the ordered quantity for the finished good or in some cases due to improved usage during the manufacturing process. In other instances, it may be more expedient to include various options on a single routing and only issue materials based on the configuration of the specific order. In any case, there is a need to clear those outstanding material quantities from the replenishment calculation. A new check box in version 7.4 allows you to do just that.

The Step Complete flag in Work Order Maintenance:

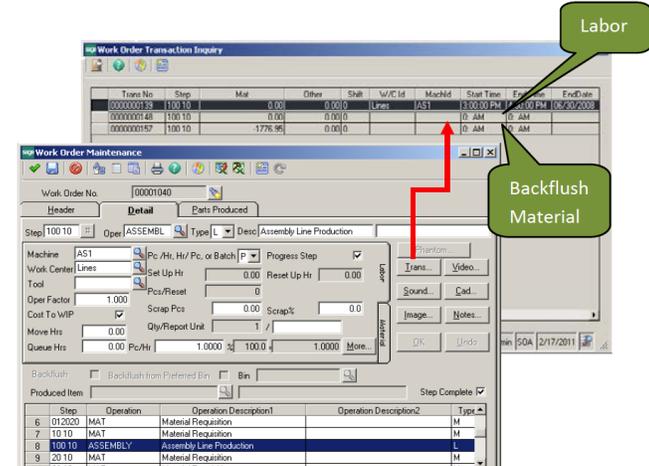
- Marks the step complete.
- Relieves any outstanding quantities associated with the line from the replenishment quantity required for work order.

Now replenishment calculations are as accurate as they need to be so that just the right materials are on hand without costly overstocking.



Backflush From Bin Tracked Warehouses

The ability to backflush material issues is the preferred method for many manufacturers due to its simplicity and time-saving advantages, especially in production environments with short turnaround times. The ability to track materials in a warehouse with bin tracking enables picking options to streamline the staging process. The challenge has been how to implement material backflush in bin-tracked warehouses. Version 7.4 addresses that challenge in conjunction with the ability to assign manufacturing bin precedence. Manufacturers can now backflush materials from bin-tracked warehouses once at least one preferred bin is identified, as long as the item is neither lot nor serial tracked. Enjoy the time savings and simplicity of backflush and the picking efficiencies of bin tracking.



Production Entry and Progress Entry Returns

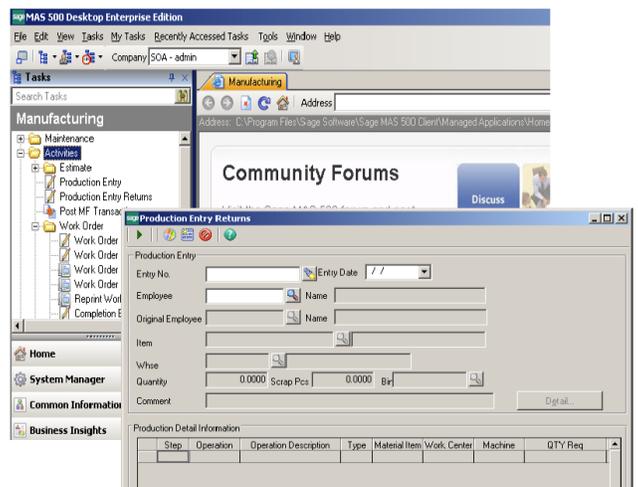
Mistakes are a reality of life in any business. The ability to quickly recover from mistakes is a key factor in maintaining productivity and minimizing down time in a production environment. Version 7.4 introduces two new tasks to make recovery from errors less time consuming and more accurate.

Production Entry Returns

The Production Entry Returns task uses the familiar Production Entry interface to reverse the quantities produced out of inventory and return materials issued back to inventory all in one task. This simplifies the process while ensuring the accuracy of the reversal all at the same time.

Progress Entry Returns

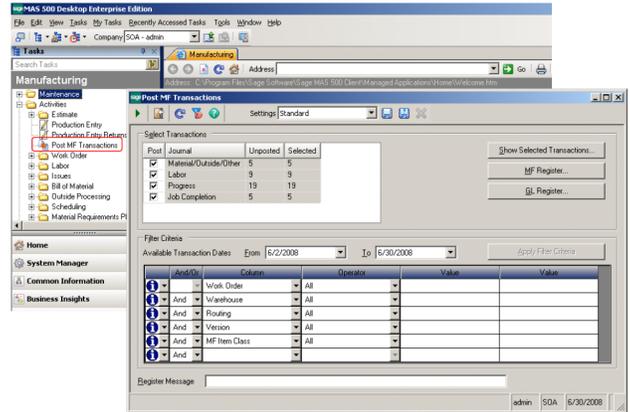
The Progress Entry Returns task also uses an interface familiar to the user to reverse the finished goods quantity out of stock, reverse backflush transactions, and reopen steps completed during the Progress Entry task. This simplifies the process and reduces the effort. The new task provides an intuitive method to adjust for the incorrect entry while enabling the capability to reenter the correct information quickly and seamlessly.



Manufacturing Posting Improvements

We heard from many in the manufacturing industry that the manufacturing posting process could be confusing, complex, and time consuming. Further, we heard from back-office staff that month-end reconciliations between the Inventory Management subledger and the associated asset accounts in the General Ledger were complicated in no small measure by the inconsistency in posting and transaction dates for manufacturing transactions. The new Post MF Transactions task in Sage 500 ERP Version 7.4 addresses both of those concerns. This new task:

- Arranges all the disparate Transaction Types on a single consolidated panel.
- Includes filtering criteria to narrow the selection to just the transactions you want to post.
- Automatically creates posting batches grouped by date to ensure they tie out to the General Ledger journal date.
- Provides a review panel so that you can verify your selection prior to proceeding with posting.



Technology Enhancements

Beyond the improvements previously discussed in web technology, analytics, and reporting capabilities—Version 7.4 delivers significant updates in compatibility with the latest version of underlying platform components, including:

- SAP® Crystal Reports XI R2 (v11.5) for Sage 500 ERP
- Microsoft® Office 2010
- Updated third-party controls
- Visual Studio 2010
- .Net Framework 4.x
- Microsoft® SQL Server 2008 R2

Your IT department and your desktop users can now take advantage of the latest advancements in reporting, development, and usability tools in tandem with Sage 500 ERP to get the most out of your software investment.

Sage 500 ERP Version 7.4 Delivers End-To-End Value

