



Timesavers from Sage Pro 7.4 Tips & Tricks

A few great tips and tricks introduced in 7.4 that are applicable today.

Our Tips and Tricks section includes some of our favorites introduced in Version 7.4. If you're not using these, then we suggest you give them a try for some real time-saving ideas.

Copy GL Batch

A Copy From option has been added to the Create Batch screen in the General Ledger that allows you to copy an existing batch or a transaction within an existing batch. You can also indicate if the posting amounts are to be switched, for example, credit amounts become debit amounts and debit amounts become credit amounts on the new entry. This is a great way to correct an entry you made accidentally, or using the wrong signs.

Improved Cycle Counting

You can import cycle counting data from your physical inventory using Excel to update the cycle counts. This feature can be linked to a programmed bar code scanner used to count the items in the warehouse and then sync that count to the cycle counting in Sage Pro ERP.

Drill Down Reporting

In an attempt to move us finally to a more paperless office, Sage Pro now allows drill-down reporting right from the preview screen. In Pro 7.4 a few reports were designed using this. To test it, navigate to AR, Choose Transactions/Invoice Register/Detail. Fill out the option grid accordingly, then choose Preview/Drill Down View. You can now click on the invoice number or customer number and it will launch that invoice or customer screen. No need to print it out anymore.