

What's New

Sage Pro ERP version 7.5

June 2008 Edition

Sage Software Telephone: (925) 461-2625
6700 Koll Center Parkway, 3rd Floor Fax: (925) 461-5806
Pleasanton, CA 94566 Website: <http://www.sage.com/>

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Introduction

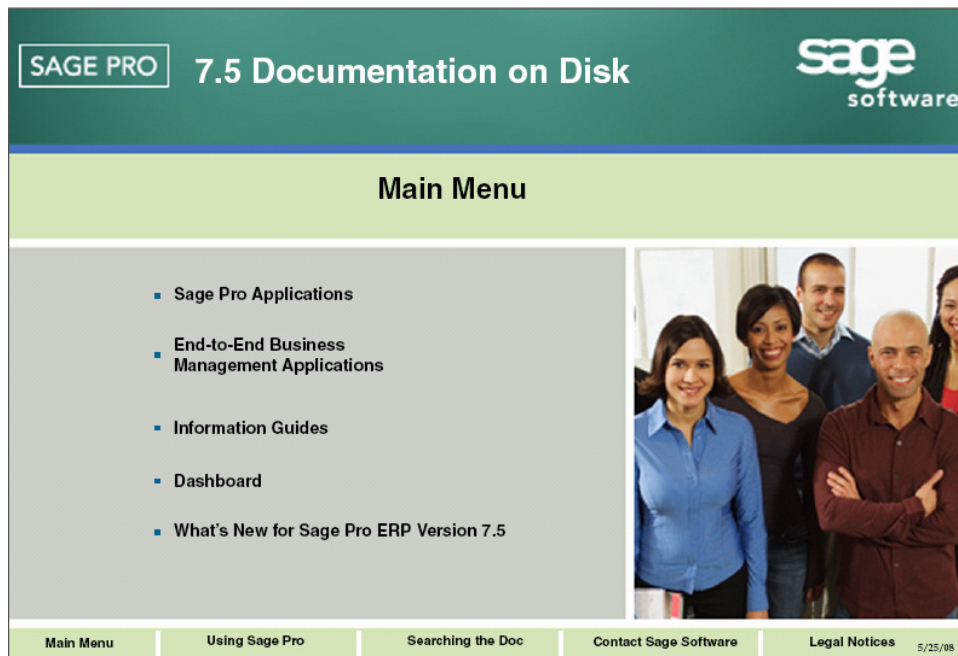
This documentation provides a brief description of the new features available in Sage Pro ERP version 7.5. The list of features is divided into the following sections:

- [Application Features](#) (features that are application-specific and relate to functionality within a selected application).
- [User Interface Features](#) (features that are directly related to the Sage Pro ERP user interface, such as user maintenance, desktops settings, and so on).
- [Data Management Features](#) (features related to how users manage their accounting data within the program, including program design changes).

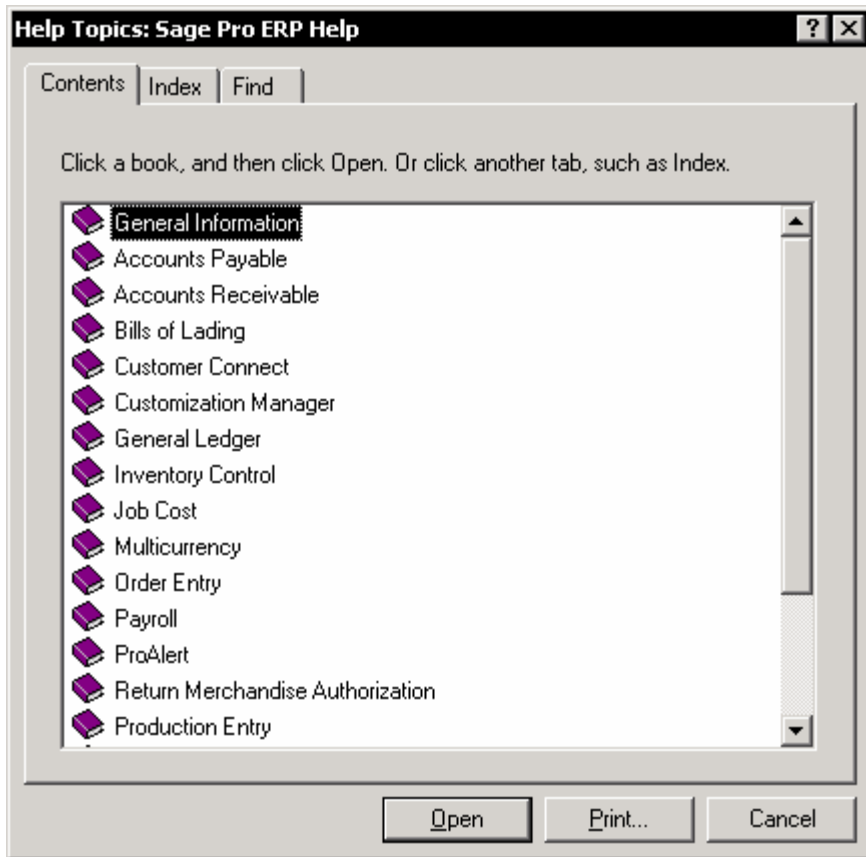
Complete documentation is available from within the program through either the Doc on Disk or Help files. You can use the Search and Index features of both the Doc on Disk and Help system to locate information on a specific topic or feature. Enter a keyword, such as “routing” and a list of topics containing the term (or group of terms) will be displayed.



To search the Doc on Disk, select **Help ► Doc on Disk** or click the Doc on Disk toolbar icon:



To search the program Help, select **Help ► Sage Pro ERP Help** or click the Help toolbar icon :



Application Features

The following features are designed to enhance the core application modules in Sage Pro ERP 7.5:

Accounts Payable

- **Inquiry on Vendor shows all periods** – Allows you to view historical data for vendors from all periods.
- **Support 2.0 OFX document in BRS (XML type)** - Sage Pro ERP supports version 2.0 of Open File Exchange (.OFX) format for bank statements bank reconciliation.
- **EFT Enhancements** – The AP Direct Payment Setup includes new settings to customize ACH outputs.

Accounts Receivable

- **Inquiry on Customer shows all periods** - Allows you to view historical data for customers from all periods.
- **Void previous period invoice** - Void previous period invoices in Sage Pro ERP if the date of the invoice falls within the current fiscal year. This eliminates the need to create credit memos to void previous period invoices
- **Allow price edit during Invoice SO Shipment** - Users can now edit prices before shipments are invoiced.
- **Rewrite eCardProc.Exe in other language** - Used Sun Java version of card processing API eCardproc software to connect PCCharge and for credit card encryption for Sage Payment Solution Gateway integration instead of MS Java (eCardproc.exe).
- **Support Sage Payment Solutions Gateway** - Sage Pro ERP Credit Card Processing now offers clients the option to integrate with the Sage Payments Solutions Gateway. This integration provides a complete line of credit card processing tools for clients that accept credit cards as a method of payments from their customers.
- **Support for Current Version of PCCharge** - The credit card processing supports the latest PCCharge Software(5.7.1 SP8)

Dashboard

- **Dashboard Customer Maintenance** - The dashboard tool has been enhanced with the addition of customer maintenance screens, which allow you to remotely manage your customers and review customer related inquiries such as Payments, Receivables, Invoices and Orders. Also, In 7.5 the dashboard tool has been improved to facilitate faster and easier development.
- **Dashboard Vendor Maintenance** - The dashboard tool has been enhanced with the addition of vendor maintenance screens, which allow you to remotely manage vendors, remit-to addresses, and view vendor inquiries.

Inventory Control

- **Inquiry on Item shows all periods** - Allows users to view historical data for items from all periods.

General Ledger

GL Drill down to PR Direct Deposits - Account inquiry screen in GL allows you to drill down to PR direct deposits.

Job Cost

- **Integrate JC with MFG** - This new feature allows users to create a work order for a finished good item in the Job Cost module and associate the item directly to a job. Upon completion of the work order, the cost of the finished good item is issued to the job. This allows for the effective tracking and billing of finished good items manufactured for jobs setup in the Job Cost module.
- **Add to Job new lines during Invoice JC PO** - Allows the user to add additional lines while invoicing JC purchase orders and post the lines to the job.

Order Entry

- **Validate Order Reference field on SO** - The **Order Reference** field on sales orders is validated for other orders with the same purchase order number to avoid duplicates.
- **Warn SO edit with a WO** - Work orders that are partially or fully released are prevented from being deleted while voiding a sales order, or while deleting a sales order line item. In addition to this, appropriate warning messages are provided indicating the reason the user cannot delete a work order associated with a sales order line, when the work order is either released or completed
- **Assign Deposit to Sales Order** - This feature allows users to enter an advanced payment against a sales order as a deposit. The user can assign the deposit when entering the sales order or later through enter cash receipts. During shipment the system prompts to apply the deposit against the AR invoice.

Production Entry

- **BOM Screen Changes** - The Bill of Materials (BOM) maintenance screen has been enhanced to support adding, deleting, editing, and renumbering components and finished goods from the treeview. By using the new drop down option, the treeview display can be viewed by BOMs, Components or Finished Goods. A search button is now available to quickly locate a treeview node.
- **New BOM Inquiries** - Two new inquiries are introduced on the BOM maintenance screen. Work Order inquiry allows users to view all the work orders associated with the BOM. Estimated cost inquiry prints and displays reports showing the estimated cost of a finished good along with the component details.

Payroll

- **Direct Deposit** - The Payroll Direct Deposit Setup provides new settings to customize ACH outputs.
- **940 Report for current year** - The Payroll 940 form can be generated for the current year.

Purchase Orders

- **Landed cost** – With support of landed costs, users can now include direct purchase expenses such as shipping, insurance (and so on), in the cost of items after they have been received into inventory. The Landed Cost feature includes the following:
 - ✓ Define landed cost codes for Duty, Freight, Insurance, and so on, and associate them with a landed cost account.
 - ✓ Set up landed cost estimates for inventory items using the landed cost codes.
 - ✓ Estimates can be established by item or item and location and can be calculated based on quantity, percentage, weight, and fixed.
 - ✓ Estimates can be set for each PO line during Purchase order entry. These estimates can be either defaulted from landed cost settings or entered on the fly.
 - ✓ While receiving the PO, the items flagged for landed cost are received into a special restricted location.
 - ✓ Actual costs can be distributed to items at a landed cost location using the Enter or Change Payables feature in the Accounts Payable module.
 - ✓ Landed cost transfers allow you to rollup actual and estimated costs into the cost of items before they are transferred to their stock location.
 - ✓ Landed cost receipts inquiry displays the cost details and allows you to drilldown into source documents for the details.

Shop Control

- **Separate number for SC rather than using WO** - Prior to Sage Pro 7.5, work orders and plan orders shared the same number scheme. In Sage Pro ERP 7.5, there is a separate scheme for plan order numbers so that the existing work order numbering sequence is used exclusively for work orders.
- **Interactive Scheduling** - Shop Control module allows manufacturing companies to create a master production schedule for their work orders. The schedule determines the order precedence along with the start date and time of each manufacturing operation. The scheduling process has been enhanced to use a wizard to support the following:
 - ✓ Filter and prioritize work orders for scheduling
 - ✓ Forward and backward scheduling
 - ✓ Preview schedules on a grid
 - ✓ Export schedules to Pivot tables
 - ✓ Export schedules to Excel
 - ✓ Print Work Center reports

Return Merchandise Authorization (RMA)

RMA Advance Replacements - The Return Merchandise Authorization (RMA) module supports Advanced Replacements which allows users to ship a replacement before actually receiving the return.

Work Orders

- **Changes to PESHIP.PRG** - PESHIP.PRG and WOSHIP.PRG have been merged and rewritten in a new class called PESHIP.VCX. This new routine has been optimized and restructured for easy maintenance.
- **WIP & Release to GL** - WIP is a comprehensive feature which gives the customer a decisive edge over its manufacturing phases and total control over inventory. In Sage Pro ERP 7.5 Work Orders, users are allowed to select a new work order status called "Released" and immediately issue on-hand components to WIP. The release process will post inventory issues to the WIP account associated with each work order. Users can release quantities partially or completely on a work order. They can also reverse the released quantities that are not used in the manufacturing process. Based on the component quantities issued to WIP, the finished good is completed and the WIP account cleared accordingly.
- **Allow assign Resource on Operation maintenance** - In the Work Order module, operations can be defined to use machine and manpower components. Users can then assign specific resource instances, such as usage cost and overhead, to each machine and manpower component on a work order. In Sage Pro 7.5, you can directly assign default resource instances to operations.
- **Add Start date to Work Orders** - Work orders default to a start date that is determined by reducing the BOM Total Lead Time from the Work Order required date. MRP reports have been enhanced to use the start date optionally.
- **MRP Report Enhancements** - New options have been provided for the Shortages MRP report to generate by Finished Good start date, Finished Good required date, or Component required date.
- **Generate WO Enhancements** - In the "Forecast" method, users have the option to use Order Quantity increments for calculating work order quantities. Additionally, when using the system date option, these quantities can be calculated for parent parts even if they are not over-allocated. When using the generate date option, users can carry forward prior period closing balances.

System Manager

- **Display System date in Standard Toolbar** - The Sage Pro System Date is displayed in the Sage Pro ERP standard tool bar.
- **User-defined default search criteria for Pick Lists** - Users can set the Search criteria for any dataview or picklist that would be used by default when the dataview or picklist is launched.
- **PDF writer** - Sage Pro ERP 7.5 ships with a free copy of Amyuni PDF writer, for use with Message Master.
- **Client feed back system** - Feedback from clients using Sage Pro ERP is important to Sage Software. A link to Sage's product feedback system has been added to the About Sage Pro box in Sage Pro ERP 7.5.

- **Windows Fax** - With the addition of this excellent utility in Sage Pro ERP, Reports generated in all modules can be faxed using Windows Faxing. Reports can be faxed to customers, vendors and other users in the company. Users can send reports to management, such as Aged Receivables, Shortage MRP, or Open Orders or fax a Purchase Order to a vendor to expedite the delivery of needed materials.
- **Source code for SQL objects** - Sage Pro 200 ERP 7.5 is available with source code for the SQL layer. This assists in troubleshooting and debugging the customized code for SQL Server database installations.
- **Report customization improvements** - With this feature, users can create custom codes, with the hooks provided, before and after the report call and report generation.
- **DrillDown Improvements**
 - ✓ **Show Report Drilldown only if the report has one** - The "Drilldown view" option appears in the preview dialog box only if it exists for the report.
 - ✓ **Setting up drilldown to be made easier** - The entire drill down process has been designed to be more user-friendly. Highly flexible options are available to the user for the drilldown. In the current version, the user is no longer required to write the script for drilldown. The user can use the "Copy script" feature to copy the existing menu script in the case of a form or report, and for dataviews, a standard template is generated for the dataview selected.
 - ✓ **Supporting drilldown for report** - The scope of the drilldown is greatly enlarged. Drilldown options are available for Customer, Vendor, Item, Invoice, PO Number and SO Number in selected reports.
- **Import wizard enhancements**
 - ✓ **Import AP Invoices** - Import wizard now facilitates importing payables.
 - ✓ **Import AR Manual invoices** - Import wizard now facilitates importing AR manual invoices.
 - ✓ **Importing Employees** - The revised import wizard ensures quick and smooth capture of employee files from external systems. Only essential information such as employee name, social security number and pay cycle are needed for the import. Employee codes can be generated automatically.
 - ✓ **Split Import process** - The Sage Pro ERP import process which helps users to import external data has been streamlined. For the benefit of users, the process is split into two parts. Conversion of external data into VFP tables and Import of VFP tables into the Sage Pro ERP database.
- **Introduce Archive flags to aid performance** - In Sage Pro ERP 7.5, archive flags were added to the master tables in AR, SO, PO, and AP. The flags are used to determine the necessity of opening archive tables when information is retrieved for a report resulting in improved performance.

User Interface Features

The following features are designed to enhance the usability and depth of the Sage Pro ERP user interface:

- **Debugging Upgrades** - Installation program SBTLOAD.PRG has been split into private and public parts to allow debugging on upgrades for issues caused by data.
- **SQL System Table Update Optimization** - For SQL upgrades, the system tables (excluding SYDFLDS) are updated on the SQL server.
- **MDI Conversion**
 - ✓ **Routes Maintenance Screen** - The maintenance of Routes for Work Orders is now easily accessible as an MDI screen. The user-friendly treeview display is now available in Work Orders Route Maintenance to identify the route as well as the associated operations and finished goods. The option to switch between Routes, Operations, or Finished Goods, is available in the treeview display. Right-click functionality gives you the option to add, delete, edit, and renumber the options available for individual operations and finished goods.
 - ✓ **Approve, Unapproved and Unexploded** - Work Orders Approve, Un-Approve and Un-Explode screen have been converted to MDI, providing even more efficiency in Work Order transactions. These screens are redesigned to use wizard functionality, commonly used throughout Sage Pro, simplifying your processing.
 - ✓ **WO Operations Maintenance Screen** - The Operation Maintenance screen in the Work Order module is converted to MDI format. Operations can now be associated with a Resource instance.
 - ✓ **WO Work Center Maintenance Screen** - The Work Center Maintenance screen in the WO module was converted to MDI format, making it easier to maintain work centers.
- **Non-MDI Wizards**
 - ✓ **WO Completion** - The easy-to-use wizard is available in the Work Order completion process, making it easy to complete a work order by walking you through the required steps.
 - ✓ **WO Explode** - The WO explosion screen was redesigned to use wizard functionality for ease-of-use.

Data Management Features

The following features are designed to help users manage their Sage Pro ERP data effectively:

- **SQL Enhancements**
 - ✓ **Primary Keys for SQL - ID COL** - Every table in the SQL database has been defined with a primary key. With a declared primary key, you can publish a Sage Pro 7.5 database using transactional replication.

- ✓ **SOX Requirements** - As part of SOX compliance, you can restrict the access by Sage Pro ERP Users to the Sage Pro Program folders. This is supported only for SQL Server installations.
- **Sample Data**
 - ✓ **Support Multiple Sample Companies** - Users can flag any company as a sample data company so that each application's system date is set to a date that falls within the sample company's current fiscal year and period similar to Company 99. This makes it easier to use the sample data for testing purposes. An option is also provided to ignore sample companies in the picklist.
 - ✓ **Reset Account structure in Sample Company to 14 characters** - Sample company 99 data is based on a sample chart of account using 14 characters. The chart of account can still accommodate up to 36 alphanumeric characters.