# Sage Pro ERP Version 7.5—Enhancement Summary

Enhancements are Pivotal in Sage Pro Version 7.5

You chose Sage Pro ERP for its distinct capability to meet your unique business needs. Whether you selected Sage Pro for its advanced customization tools, the easy access it gives you to real-time business information, or its integration with a wide range of extended business solutions, you have come to trust Sage Pro to help your business succeed. There are now even more reasons to rely on Sage Pro with dozens of new features designed for your business in version 7.5. Many of your requests have been built into this newest version, giving you tools to improve your business productivity, and enhanced access to critical business information.

Create Your Own Custom Drilldowns

The entire drilldown process is made much simpler and more user friendly in Sage Pro 7.5. It is no longer necessary to write your own script for drilldowns. Sample drilldown scripts are available in the product, so whether you want access to a specific screen or a specific report you can simply copy the script code from the existing menu definitions. You can even create a user-defined template if you want to drill down to a data view. Access to this business information through drilldown options is easily created on the fly.
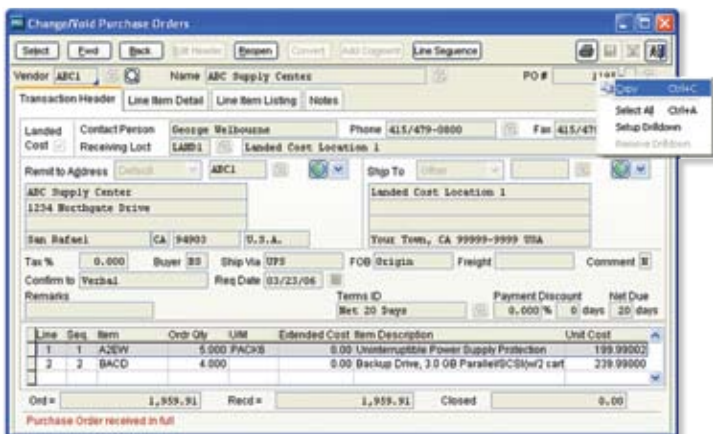

▲ *Simply right-click on any field to set up a new drilldown.*

Expanded Drilldowns in Reports

Drilldown capabilities in reports are greatly expanded in Sage Pro 7.5, adding even more operational convenience. Drilldown options are now available from more reports, giving you access to Invoices, Purchase Orders, and Sales Orders, along with the access to Customers, Vendors, and Items that was available previously in Sage Pro. For maximum customization, you can also tie drilldowns to reports, giving you access to the information that is important to you.

Added Customer and Vendor Maintenance Access in Expanded Dashboard

With enhancements to the dashboard tool, you can now remotely manage your customers and vendors. Perform any of the newly available customer- or vendor-related inquiries, such as Payments, Receivables, Invoices, and Orders.
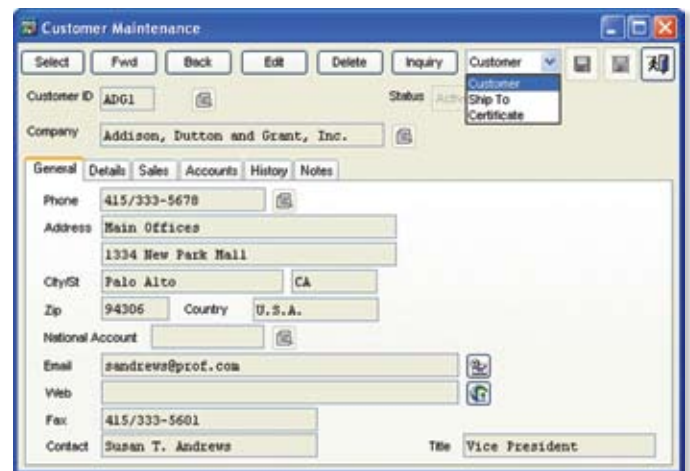
▲ *Expanded Dashboard capabilities allow Customer file updates through remote access to the Sage Pro Customer files.*

For more information about Sage Pro, contact your certified Sage Software Business Partner or call 866-859-2378 to speak to a Sage Pro representative. Visit www.sageproerp.com

Work in Process Components Released to General Ledger

On-hand component inventory is more accurate than ever in Sage Pro ERP 7.5. Ideal for manufacturing companies that have longer production cycles, an option in *Work Orders* allows you to issue on-hand components to the *Work in Process* account associated with each work order. This flexible feature lets you release or partially release quantities on a work order as the production process is started. If orders change during the production process, you can also reverse the quantities allocated but not used in the manufacturing process. When the work order is completed, finished good items will be received into inventory.

▲ *A Work in Process account can be associated with each work order and allows components to be released from Inventory.*

▲ *In Work Order Release Wizard, specify the component on each Work Order to be released.*

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Numerous Manufacturing Enhancements

Enhancements abound in Sage Pro 7.5 integrated *Manufacturing* modules—*Production Entry*, *Work Orders*, and *Shop Control*. This release features improved processing in manufacturing operations as well as improved business productivity tools, all designed to streamline your day-to-day business practices.

Bill of Materials Screen Enhancements

Improvements in the Bill of Materials (BOM) screen in *Production Entry* give you greater access to the information that you need to see. For example, right-click functionality in the tree-view display gives you options to add, delete, edit, or renumber components and finished goods. The tree-view display option also gives you the ability to switch between BOMs, finished goods, or components views. Search functionality in the BOM screen helps you to track down any BOM.

▲ *Display options include BOMs, components, or finished goods in the tree-view hierarchy*

Bill of Materials (BOM) Inquiry Displays Estimated Cost

The inquiry function in the BOM maintenance allows you to view the work orders associated with the bill of materials. Reports can be generated showing the estimated cost of a finished good item along with the cost and extended cost information of its components. You can even associate various *Routes* or explosion methods to a specific BOM in order to estimate the cost of production when performing "what if" analysis.

Work Order Screens Now Easier to Use

To give you the easy access to information that you need, many of the manufacturing processing screens have been converted to allow multiple screens to be open simultaneously. With the ability to have several screens open at the same time, maintenance of *Work Centers* and *Routes for Work Orders* is now easier. The new *Operations Maintenance* screen also allows all maintenance options to be accessed simultaneously allowing activities to be completed quickly. The *Approve*, *Unapprove*, and *Unexplode* process screens have also been updated to allow multiple screens to be open simultaneously, providing even more efficiency in the *Work Order* transactions.

Expansion in Work Order Route Maintenance

The user-friendly tree view display is now available in the *Route Maintenance* screen making it easier to identify the route as well as the associated operations and finished goods. The option to switch between *Routes*, *Operations*, or *Finished Goods*, is also available in the tree-view display. Right-click functionality also gives you the option to add, delete, edit, and renumber options available for individual operations and finished goods.
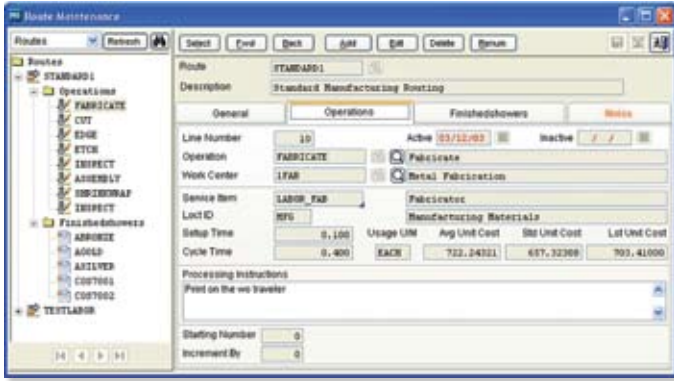
▲ *Related screens are consolidated into tabs on the Route Maintenance Screen for ease of use.*

Added Work Order Wizard Functionality

The easy-to-use wizard enhancement, now available in the *Work Order* completion process, makes it simple for you to complete the processing by walking you through the steps you need. The *Explode Work Orders*, *Unexplode Work Orders*, *Approve Work Orders*, and *Unapprove Work Orders* screens are redesigned to use wizard functionality, commonly used throughout Sage Pro, simplifying your processing.

Separate Plan Order Numbers in Shop Control

New in Sage Pro 7.5, a separate plan order numbering sequence now exists so that the work order numbers are used exclusively for work orders and no longer shared with the plan orders. This eliminates any confusion that could arise from a shared numbering scheme. Plan and work order numbers can be shown in the following *Shop Control* features and reports: *Change Plan Orders*; *Import Work Orders*; *Implement Schedule*; *Plan Order Summary— Schedule Report*; *Plan Order Detail—Schedule Report*; and *Work Centers—Schedule Report*.

Assign Resources in Operation Maintenance

Assign specific resource instances, such as usage cost and overhead, to each machine and manpower component on a work order more easily than ever before. Machine and manpower items are set up for operations, and default resource instances are assigned at the same time.

When work orders are exploded, the machine and manpower items are created as component line items along with their default resource settings. You are also able to edit and change the resource settings for usage cost and overhead on the component line items as needed.

Generate Work Order Enhancements

Work Orders can be created automatically, in batches, using innovative functionality. The "Forecast" method creates work orders for parent parts that are over-allocated. The calculated quantity of the parent part is increased by the value of its order point field. The *Generation* screen contains a new option to use order quantity increments to calculate work order quantities. New fields for manufacturing order point and manufacturing order quantity are added to the item at location screen so that separate values can be set up for generating work orders.
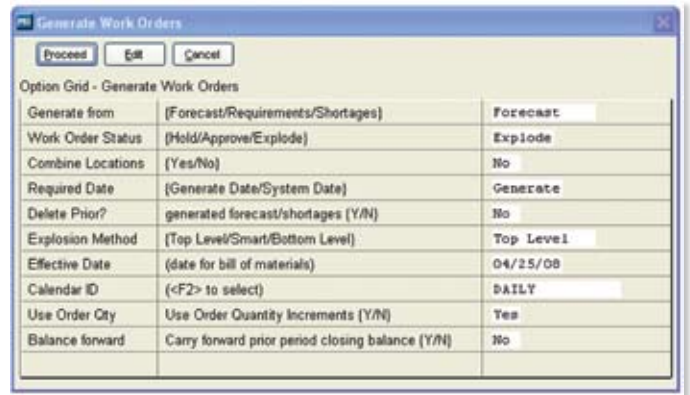
▲ *New Generate Work Order screen makes it easy to create multiple work orders by different generation methods in the same batch.*

Job Cost Integration with Manufacturing Modules

Made-to-order manufacturers can now benefit from the integration of *Job Cost* with the *Work Order* module. Labor costs, subcontracting costs, and other expenses can be accumulated in *Job Cost* module while the *Work Order* module handles the production costs of the finished goods.

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 specifically for jobs set up in the *Job Cost* module.

Create Master Production Schedules for Work Orders

Manufacturing companies can create master production schedules that determine order precedence along with the date and time of each manufacturing operation. New in Sage Pro 7.5, the drag-and-drop screen lets you set work order precedence prior the creation of a schedule. These updates help production teams to fine-tune their inventory planning and production schedules. Scheduling plan orders makes it easier than ever before to do "what if" analysis needed in the manufacturing environments.

Include Landed Cost in Inventory Valuation

In response to numerous requests from Sage Pro customers, version 7.5 now supports landed costs, allowing expenses such as shipping and insurance, associated with imported goods, to be included in the cost of the items after they have been received into inventory. Simply set up landed cost codes, such as *Duty*, *Freight*, and *Insurance*, with an associated landed cost account.

Then, during the receiving process, items flagged for landed cost are received into a special restricted location where they can only be used for landed cost-type transactions.

You now have the flexibility to assign landed costs by estimates or by actual cost to each item received. When items in the landed cost location are transferred to their stock location, the cost of the items is updated to include the full costs of the goods.

▲ *Easily assign landed costs by actual cost incurred or by various estimation methods.*

Improved Program File Security

As part of the ongoing Sage Software commitment to keeping your important financial information safe and Sarbanes-Oxley compliant, you can now restrict access to the Sage Pro Program folders. This security improvement, which is supported for SQL Server installations, greatly enhances the security of the program files.

Support for Sage Payments Solutions Gateway in Credit Card Processing

You now have the option of integrating Sage Pro Credit Card Processing with the Sage Payments Solutions Gateway. From the software that handles your customers' transactions to the credit card processor to the management reporting tools, you can rely on one vendor, Sage Software, to simplify your credit card processing, provide competitive rates and ensure system compatibility.

Other Time-Saving Enhancements

- **Validate PO number field when entering Sales Orders**—minimize possible duplicate sales orders by checking for previous orders from the same PO number
- **Option to set search criteria in Pick Lists**—display the information in a format that you want to see
- **Import wizard enhancements for Customers, Vendors, Items, and Employees**—easily add records to your Sage Pro application with fewer keystrokes than before
- **Import Accounts Payable or Accounts Receivable (AR) manual invoices**—easily bring in records from any external application
- **Import Employee files**—new import function allows you to save data entry time when adding new employee records
- **Void previous period AR invoices**—greater flexibility when you need it
- **Enable advance replacement shipments in Return Merchandise Authorization**—when your customer needs the replacement part quickly, send out an advance shipment before the original goods are returned
- **Assign deposit to a Sales Order**—properly credit the customer's account with deposit paid when a sales order is placed
- **System alert given when a Work Order is tied to a Sales Order that is being edited**—now you can be sure to update all related records
- **Display system date in standard toolbar for easy reference**
- **PDF writer added to support Message Master functionality to make it easy to distribute forms and statements electronically**
- **New Support for Windows Faxing for use with Message Master**
- **Product Feedback Link to Sage Software**— Go to the Help menu in Sage Pro and click on the About Sage Pro to find our Customer Feedback link. Here you can let us know the future enhancements you need to help your business succeed. The product feedback link is also available at **www.sageproerp.com**

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