

# What's New?

Sage Pro ERP 2011

# Sage Pro ERP

Jan 2011 Edition

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## Introduction

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This documentation provides a brief description of the new features available in Sage Pro ERP version 2011.

Complete documentation is available from within the program through the Doc on Disk. 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.



## Application Features

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The following features are designed to enhance the core application modules in Sage Pro ERP 2011:

### Accounts Payable

- **1099 Improvements** - This feature provides customers with an easier way to file accurate 1099s by allowing for:
  - Ability to easily change past 1099 forms from prior year if necessary.
  - Easily create a summary report to validate all data on the 1099 before submitting.
  - Recalculate application balances for 1099 amounts if necessary to ensure accurate data is sent.
- **Bank Reconciliation Changes** - This process is enhanced to make the reconciliation faster, easier and more accurate:
  - Search records in the Bank Reconciliation dialog using user defined search criteria and the ability to find next occurrence.
  - Sort records in ascending/descending order by clicking on any column header in the Bank Reconciliation dialog.
  - Short cut buttons to select/unselect all types of transactions, while loading Bank Reconciliation dialog.

### Accounts Receivable

- **New customer alert system** – Ability to easily alert all employees about an important fact related to a customer. This alert can then be presented to the user prior to important actions being taken such as shipping inventory to a customer. For example, you could place an alert on a customer saying bad credit. Then whenever a lookup is done on the customer, this alert could appear allowing the user to decide if they would like to move forward with the action.
- **Customer maintenance history to display average days to pay** – Users can see the average days to pay for each of their customers. By viewing the average days to pay for each customer, you can now easily identify the customers that take longer to pay their invoices. The Aged Receivable report provides a new option to view the customer average days to pay. Also a new dataview is now available to view the history average days to pay for all the customers.
- **Set up deferred invoicing per customer instead of companywide** - A new setting is available at the customer level to designate whether customer will be allowed to have deferred invoicing.
- **Credit Card Compliance and Improvements** - Improve productivity by using new, improved and PADSS compliant credit card module. New options are available for voiding pre-authorized transactions. Card expiration date can also now be modified through customer credit card maintenance. Default customer address will be automatically populated while creating a new credit card ID or selecting custom option during transactions. Card Verification Value (CVV) can be provided during transactions by selecting “Enable CVV” option in Credit Card Connection



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maintenance. Sage Exchange only supports English, French and Spanish languages. The following is a list of accepted characters for Alpha Numeric fields:

a-z

A-Z

0-9

-.#&()/!èèèèòóôöòàáâãäåîïñùúüÿÿ

The following is a list of accepted characters for Numeric fields:

0-9

,-

The use of two or more dashes -- back to back is not permitted in any of the fields.

- **Set default warehouse location for each customer rather than company wide** - Allow for the default warehouse location to be at the customer level. This would for example allow west coast customers to ship from the west coast warehouse and east coast customers to ship from the east coast warehouse
- **Drop ship allocations**– Drop ship items are now automatically allocated and thus allow you to view allocations and on-order values for drop ship items at drop ship locations.
- **Commission on Zero Dollar Invoices/Shipments** - Commissions are calculated for zero dollar Invoices and shipments.
- **Recalculate YTD sales using transaction dates** – YTD sales are now recalculated using the transactions dates. If transactions don't fall within the current fiscal period, they will be omitted from the YTD totals.

## General Ledger

- **Option for account numbers on some financial reports** – A new option is now available on the report grids to display the account number for the following reports.
  - Detail Income Statement for Period to Date
  - Detail Income Statement for Period and Year to Date
  - Detail Income Statement Range of Periods
  - Balance Sheet Single Column
  - Balance Sheet with Period to Date Activity
  - Balance Sheet with Year to Date Activity
  - Balance Sheet Indented Subtotals

## Inventory Control

- **Inventory count improvements on group entry** – Group inventory count now allows selecting multiple items at the same time to edit, instead of one after the other. Also you can now mark some items for edit, while marking the rest as counted in the item selection dialog.



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## Purchase Orders

- **Import Vendor Price List** –A new option is now available on the Item Cost Level dialog that will allow you to import manufacturers/vendor price list easier and faster. This new option uses the import framework and thus allows multiple import format, schemas, etc.
- **Automatically Default Landed Cost** – Purchase order entry/edit dialogs now recognize items associated with landed cost locations and allow you to automatically convert the transaction into a landed cost transaction. Thus preventing user from making a mistake while creating purchase orders for items that have landed costs assigned to them.

## Payroll

- **Payroll to Print Laser four W-2 forms per sheet** – It is now possible to print W-2 Forms on a four part laser form for laser pre-printed forms. The order part number for the form is BW24UP.

## Work Orders

- **Item Drill down to show BOM maintenance detail** - This feature will allow users to be able to drill down and see the contents of the BOM throughout the Sage Pro product without having to go into different screens and losing their place.
- **Revision number will now print on the work order traveler** – Component revision numbers are now displayed on the work order traveler to ensure the goods are manufactured correctly.

## System Wide

- **YTD to stats page for Business Status Report (BSR)** - New options are now available on the BSR statistics page to view year to date details. Executives can now easily see the year to date information related to key metrics across the organization including AP and AR
- **New utility to update dashboard ID**- If the Sage Pro install is moved from one location to another location, you will no longer have to reinstall Sage Pro in order for the id to be updated. This feature will generate a new id based on the current installation of Sage Pro.
- **Ignore Check for Database Version** - Users can now install Sage Pro ERP using their own DSN, thus allowing them to support new versions of SQL without a program change or a hotfix.
- **Easily switch between add and edit order screens** - With a single click, users can now easily move between the add order and edit order screen within Sage Pro. The same function is also available in screens Enter Payables, AR Invoices, Create Journal Batch, and Enter Purchase Orders.

