

What's New?

Sage Pro ERP 2010



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National Presence - Local Touch

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Introduction

This documentation provides a brief description of the new features available in Sage Pro ERP version 2010. 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.

Application Features

The following features are designed to enhance the core application modules in Sage Pro ERP 2010:

Accounts Payable

- **8148 - Ability to change date when Voiding AP invoices** - Users can now enter a date for voiding an AP invoice. This enables to void an invoice in a prior or future period date without changing the system date.
- **8155 - Ability to void prepayment checks** - Users can now void AP prepayment checks after applying to an invoice. The paid invoices will be re-opened and the debit memo created will be voided.
- **8041 - Ability to set default date when voiding AP and PR checks** - Users can now enter a void date while voiding AP / PR checks and Direct Deposit. This enables to void the checks or direct deposit in a prior or future period date without changing the system date.

Accounts Receivable

- **8166 - Show last apply date for National Accounts** - This feature updates and shows the last applied date and amount in the customer maintenance screen for national account and regular customers. Earlier only last payment date and amount was available and there was no way to get to know the last applied date and amount.
- **8134 - Purchase Card Level II Support** - This feature allows you to process Commercial credit cards, purchase cards or business card as credit card level II transactions by passing customer account code and the sales tax details. This will lower processing fees for Visa and MasterCard transactions by submitting Purchase card level II data. The system will now accept customer code and sales tax details on the credit card processing screens to be passed apart from standard financial information.

Data Driller

- **8158 - Data Driller Organization** - The new feature allows users to define Dataview Groups and associate Dataviews to these groups. This enables to have an organized view of the dataviews and search a favorite dataview quickly.

Inter-Company Transactions

- **8137 - Enhance ICT Reports** - A new report menu for ICT transactions that were,
 - Distributed in the source company.
 - Received from other companies.
 - Consolidated (Distributed or Received).

- **8135 - Multiple Control Accounts in ICT** - User s can now select any account as the Inter-Company Clearing Account. The existing ICCA in GL setup will henceforth serve as the default account.

Import and Export Features

- **8159 - Export Capabilities** - Data Center is now enhanced to export any table in several formats.
- **8146 - Import Item at Location** - A new import option has been added for importing items at location.
- **8146 - Import Item Supplier Records** - A new import option has been added for importing item supplier records.
- **8164 - Import Vendor Pricing** - The Vendor Cost Levels screen has been enhanced to export the cost level to Excel and then import back from Excel similar to Price Groups.
- **8014A - Improve and Expand Several Import Functions** - The following enhancements have been made across several import functions.
 - a) Allow editing the un-posted GL batches, which are imported using "Update from External Files". This enables the user to distribute the amount for ICT account and voiding the batch.
 - b) Allow users to import line level descriptions.
 - c) Allow users to print the invalid postings before continuing with the import process in "Import PR postings".
 - d) Control the display of confirmation dialogs in "Import Inventory Receipt" wizard.
 - e) Prints a report of items imported for which the confirmation/warning dialogs are suppressed during "Import Inventory Receipts".
- **8014B -Display Completion Status of Imports** - This enhancement displays a status bar message showing the number of the import record and the total number of records tagged for importing.
- **8014C -Process Imports in Background** - All master import options in File | Import menu now have a "Quick Import" facility to accomplish the import process in background without the screen visibility. This improves the efficiency of the import process.

Purchase Orders

- **8170 -Shortcut to receive PO from change or void** - A new shortcut button has been added to the PO Change or Void Orders screen to launch the "Receive Orders" screen.

Payroll

- **8012 - Overflow Check Stubs for Payroll Checks** - It is now possible to print the multiple tax / deductions details of check stubs using a separate paper and printer location.
- **8022 - Direct deposit - Option for NPC to WEB upload** - This feature facilitates using the Web Site 'www.webdirectdeposit.com' directly to upload file without using modem based software program. When Sage Pro Payroll Direct Deposits files are created, it updates TRANSMIT.NPC and the Batch file (Direct Deposit files). The TRANSMIT.NPC holds the Batch file name, and it transmits this Batch file directly to NPC

Order Entry

- **8132 - Show Payment Details on SO and Invoice** - This feature prints the details of the deposit collected against an order in Sales Order printing and Open Order s report. Invoice printing is also enhanced to print the applied amounts/ payments received details and also displays balance invoice amount.
- **8172 - Multiple Deposits on SO** - Sage Pro ERP now allows collecting multiple deposits against an SO. It is also now possible to collect deposits through SO Change or Void Orders.
- **8002 - Reserve Inventory** - This enhancement will allow reservation of normal stock items for a Sales Order. The Sales Order's line item can be reserved from the available quantity on hand. Reserved item quantity cannot be issued from inventory, for any reason other than being shipped against the sales order, for which the item quantity is reserved. The reservation required for a sales order can be moved from another sales order, optionally.
 - Reservation will be done from Enter Orders/Change or Void Orders.
 - Enter Order screen will have a check box to mark for reservation.
 - Reservation is available only for normal items and not for serial/lot and non-stock items.
 - New screen for Reservation to reserve from item quantities file.
 - During shipment the reserved stores and bins are automatically selected.
 - New reports to list the details of reservation.
 - Display total reserved quantity in Item Maintenance and Item at Location screens.
 - Inquiry for reservation while displaying reserved quantity.
 - Move reservation from other sales orders.

Work Orders

- **8142 - WIP by Component** - This feature enables to print the Work in Progress report grouped and ordered by component. It helps to know the total quantity of a particular/all component items required for all the jobs in one print. Component totals will not be scattered based on FG.
- **8141 - Allow Editing Partially Released WO** - This feature allows the user to edit the required quantities of released component lines of a work order.

8145 – Enabling Order Quantity of SO FG Line Item - This feature allows changing the order quantity of sales order Finished Good line item. When the quantity of that line is changed, reconfiguration of components takes place according to the explosion method and the BOM setting.

System Wide

- **8019 – Ability to Export Data from Report Option Grid to Excel**– The feature gives users the ability to export directly from the report option grid into Excel allowing them to choose either formatted or unformatted data.
- **8079 – Support Office 2007** – Sage Pro ERP is now fully compatible with Microsoft Office 2007 and its new formats of Word and Excel like DOCX and XLSX in various processes like Import, Export, Merging, Dunning, Charts, Pivot table etc.
- **8139 – Support SQL Server 2008 / SQL Express 2008** – Sage Pro ERP now supports SQL Server 2008 and SQL Express 2008 as backend database. SQL Server 2008 is the latest SQL Server version, which includes a variety of new features, improvements and additions like new Data Integration features, enhancements to Analysis Services, Reporting Server additions and Office integration
- **8165 – Save Window Position Locally** – Sage Pro ERP now facilitates to store the screen positions in a local table optionally instead of the system table SYUFSPR. This helps a significant improvement in performance in a typical multi-user environment when many users simultaneously exit out of the screen
- **8171 – User Defined Hot Keys for Favorites** – This feature provides the ability to have easy access to favorite forms by defining Hot Keys (like ALT – K) in the Organize Favorites screen.
- **8018 – Ability to Customize Report Option Grid** – The enhancement allows creating and using custom filters in addition to the default system filters for printing the report. The report option grid values can be saved and reused as required.
 - a) Two new buttons <Custom Filter> and <Preferences> are available in existing report option grids.
 - b) The active custom filter will be shown below the command buttons in a label.
 - c) The <Preferences> option will behave like the preferences in GL and PR.
 - a. Clicking this button will bring up the following options in a popup menu.
Reset Values, Load Values and Maintain Values
 - b. The system report option grid values can be saved, maintained and reused by using Reset Values, Load Values and Maintain Values options.
 - c. The preference set will be loading automatically, when it has been marked as “Load as Default”.
 - d) The <Custom Filter > option will allow user to :
 - a. Select predefined custom filter and assign values on the fly
 - b. Launch Custom Filter Maintenance screen, which allows
 - i. Defining new customer filters
 - ii. Assign additional sort options

- iii. Select criteria to qualify the custom filter
- c. Allows setting the grid values as default and filter as default filter



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