

Version 7.40 Customer Upgrade Guide

Sage ERP MAS 500

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Introduction

Sage, a recognized leader in accounting software for small- and mid-size businesses, welcomes you to Sage ERP MAS 500 version 7.40.

About This Guide

This guide has been created to highlight the many new features and enhancements that you will enjoy after installing version 7.40. While the extensive new features included in this release have been designed to improve your workflow and business processes, this means that the way you use your system may change. Chapter 2 of this guide contains all the enhancements for this release. The remaining chapters specifically highlight the differences that you need to be aware of, and steps you need to take, before you begin using the new system.



NOTE

You can also download the documents at: www.sagesoftwareonline.com

Review the information in this guide before performing the software installation and migration steps in your *Installation and System Configuration* guide. The *Installation and System Configuration* guide and other installation documents can be accessed from the Installation Home Page on the Sage ERP MAS 500 Installation DVD. To access the Installation Home Page, insert the Sage ERP MAS 500 Installation DVD into the DVD-ROM drive. If Autorun is enabled for your DVD-ROM drive, the Installation Home Page appears automatically.

Enhancements

For a complete list of enhancements and changes to the software, after installing, refer to the What's New page and the Release Notes. For the What's New information, see What's New in Version 7.40 on page 5. You can also access the What's New page by clicking What's New on the Desktop's Resources page. The release notes are located in the Documentation folder in the Sage ERP MAS 500 DVD.



NOTE

You can also download the release notes at www.sagesoftwareonline.com

This guide contains the following information you need for a successful upgrade:

- Installation changes
- Global changes in the software
- Changes to the modules

Graphic Conventions

The following icons are used throughout this manual to indicate different types of information.



The **NOTE** symbol is followed by additional information about a topic.



The **WARNING** symbol is followed by information to help you avoid costly mistakes.

Text Conventions

The following table describes the text conventions used in this manual.

Text Convention	Explanation
Menus	<p>Menus are shown in this format: Select menu > menu task name.</p> <p>Examples:</p> <ul style="list-style-type: none"> • Select File menu > Change Company. • Select General Ledger Maintenance menu > Maintain Budgets.
Bold font	<p>Indicates text entered at a field or text selected at a field.</p> <p>Examples:</p> <ul style="list-style-type: none"> • At the Value field, type a search value, such as 01, for the lookup. • In the Filter window, to delete a filter, select <none> at a filter's Column field.
<i>Italic font</i>	<p>Indicates references to other manuals.</p> <p>Example:</p> <ul style="list-style-type: none"> • For more information about installation, refer to your <i>Installation and System Configuration</i> guide.

What's New in Version 7.40

Global Enhancements

eBusiness Suite for Sage ERP MAS 500 powered by RKL eSolutions

The new eBusiness Suite for Sage ERP MAS 500 is an upgrade replacement for the ageing eSalesforce and eCustomer modules. The eBusiness Suite is a state-of-the-art e-commerce platform that can help make your sales effort more effective and productive, resulting in higher sales revenues. Comprised of an e-commerce server and a Web Services module, the eBusiness Suite provides sales, support, and customers with 24x7 Web access to Sage ERP MAS 500 so your team can securely access customer and inventory data, while customers can place orders and access order status information, all over the Web.

The Basic Platform is available at no additional charge to existing eCustomer and eSalesforce customers who are current on maintenance. For more information, see http://www.sagemas.com/products/techpartnerproducts/endorsed_solutions/.

Product Enhancement Program

You now have the option to participate in the Product Enhancement Program (PEP). Through PEP, Sage collects anonymous information that will help us identify trends and usage patterns to improve the quality of the products and services we offer. Sage will not collect any personally identifiable information or financial information about your company.

When installing or upgrading to a new version of Sage ERP MAS 500, you will be automatically enrolled in PEP. You can opt out at any time by using the Maintain Site task.

Unit of Measure Enhancements

- You can now select the unit of measure when printing information on the Inventory Cost Report, Inventory Valuation Report, and Stock Status Report.
- The entry of conversion factors and calculation of conversion factors is now modified to use higher precision, and users can now select the direction of the conversion factor. These changes are now effective in Common Information Set Up Units of Measure and Maintain Non-Inventory Items, and in Inventory Management Maintain Items.
- In Common Information Maintain Non-Inventory Items and Inventory Management Maintain Items, if the unit of measure uses the standard conversion factor, that factor will now appear. In addition, the standard conversion factor now defaults when a new unit of measure is added to an item record.
- You can now import the units of measure for non-inventory items.

Accounts Payable Enhancements

You can now post the freight amount to the general ledger account associated with the purchase item if the Post Freight to Item check box is selected in Set Up PO Options or Set Up AP Options. Previously, the voucher line freight amount posted to the incoming freight account associated with the shipping method.

Accounts Receivable Enhancements

- You can now process customer refunds for any tender type, for example, cash, check, or credit card, regardless of whether the Credit Card module has been activated. Previously, you could process refunds only for credit card transactions and only if the Credit Card module was activated.
- The Print Refund Checks task has been added to the Accounts Receivable Activities menu. You can now print refund checks for multiple batches from this task, or you can click the new Print Refund Checks button in the Process Cash Receipts window to print refund checks for the current batch.

- A check register has been added to the registers that print during pre-posting when processing cash receipts.
- A Refund History Report and a Check Listing are now available on the Accounts Receivable Insights Reports menu. Also, refunds are now reflected in the Customer Payment Activity Report and the Customer Payments view.
- In Apply Payments and Memos and Enter Cash Receipts, you can now over pay an invoice resulting in a negative invoice balance. You can apply the negative-balance invoices to other documents in Apply Payments and Memos. Additionally, you can also apply negative balance invoices to other documents in Enter Cash Receipts.
- Negative-balance invoices will be treated as open invoices in Customer Status and Business Insights, and they will be included in the Aged Receivables and Trial Balance reports and in customer statements.

Business Insights Enhancements

- You can now limit the number of rows that appear in Business Insights views by entering a value at the Maximum Rows field in System Manager Maintain Business Insights Views / Content Menus. If your view returns a large number of rows, limiting the number of rows that appear may decrease the amount of time that it takes for the data to appear in the view.
- When the Maximum Rows feature is in use, you can click the Show All button on the Business Insights Analyzer or Explorer toolbar to view all of the records.
- When exporting data to Excel from Business Insights Analyzer or Explorer, you can now select whether to export only the data that appears in the grid or all data.
- You can now export data from Business Insights Analyzer and Explorer to a PDF document. When you click the Export Options button on the toolbar, you can select whether to export only the data that appears in the grid or all data.

- When creating filters in Business Insights Analyzer or Explorer, you can now add a column to the Filter pane by right-clicking the column header, and then clicking Add xxx to Filter (where xxx represents the column name). If a column has already been added to the Filter pane, you can remove it by right-clicking the column header, and then clicking Remove xxx from Filter (where xxx represents the column name).

Inventory Management Enhancements

Buyer and Primary Vendor Changes

- You can now maintain the primary vendor at the inventory if the Warehouse Replenishment Primary Vendor check box is clear in Maintain Inventory.
- You can now override the buyer and primary vendor during order generation when using inventory replenishment and override the buyer when using MRP. Previously, if the buyer and primary vendor were defined for the purchase product line for the inventory record, the assigned buyer and primary vendor were used for the suggested orders. Users can now change the primary vendor in Inventory Replenishment or the buyer and primary vendor in MRP on the suggested orders.

Replenishing Orders

In Process Replenishment Orders, you can now delete all suggested orders during the replenishment process. Additionally, all but the Create Suggested Orders option are now disabled when no suggested orders exist.

New Options in Set Up Landed Costs

In Set Up Landed Costs, you can now allocate to the receipt total or receipt lines and assign various new allocations methods for costs applied at the receipt total level. Previously, you could only allocate to the receipt lines.

Distribution or Manufacturing Bins

- In Maintain Inventory, you can now designate the bin hierarchy or add a separate one for manufacturing. Additionally, you can use the distribution preferred bin during the manufacturing process.

- In Create Inventory, you can now add items to a warehouse by the distribution or manufacturing preferred bin. Additionally, you can distribute materials for manufacturing from either the distribution or manufacturing bins by order of preference, and received finished goods by bin preference as well. Previously, the distribution bin was used.

Transfer Orders Changes

You can now set the unit of measure when entering transfer orders in Enter Transfer Orders. Previously, all transfer orders used only the stock or base unit of measure.

Item Unit Of Measure View

You can now view the unit of measure information for an item from Insights > Explore menu > Items by selecting the new Item UOM view. The Item UOM view displays the zero quantity items with non-zero quantities.

Manufacturing Enhancements

- In Work Order Maintenance, you can now set a material or labor step to complete. Marking a material step complete when quantities remain relieves the quantity from the Quantity Required for Work Order field, thereby, adjusting the replenishment position and avoiding overstocking. Previously, a material or labor step was only set to complete during labor entry or material/outside/other issues.
- In Manufacturing, you can now backflush a material/outside/other step from a bin tracked warehouse as long as the item is not lot or serial tracked. Previously, a material step could not be marked as a backflush step if the warehouse associated with the detail step was tracking quantity at the bin level.
- To simplify the posting process for manufacturing transactions, a new Post MF Transactions task has been added to the Activities menu to replace the Manufacturing Completion Journal, Manufacturing Labor Journal, Manufacturing Progress Journal, and Manufacturing Material/Outside/Other Journal tasks. Additionally, this new task allows you to select the transactions to post and uses the transaction date as the posting date.

- A new Progress Entry Returns task has been added to the Activities > Labor menu that allows you to return finished goods from inventory, reverse backflush transactions posted from progress, and return manually entered costs to work in progress. This allows you to return quantities and costs to entries that were posted in error. Previously, incorrect postings could be corrected only by entering manual inventory adjustments to correct inventory quantities for materials and finished goods and by making manual general ledger entries to correct the financial impact of the progress entry transaction.
- A new Production Entry Returns task has been added to the Activities menu that allows you to return finished goods inventory for production transactions posted from Production Entry. This allows you to return quantities and costs to entries that were posted in error. Previously, incorrect postings could be corrected only by entering manual inventory adjustments to correct inventory quantities for materials and finished goods and by making manual general ledger entries to correct the financial impact of the production entry transaction.

Purchase Order Enhancements

Data Entry Changes

You can now post the freight amount to the general ledger account associated with the purchase item if the Post Freight to Item check box is selected in Set Up PO Options or Set Up AP Options. Previously, the line item freight amount was posting to the incoming freight account associated with the shipping method.

Landed Costs

- A new Enter Landed Cost window has been added to the Process Receipt of Goods task that allows you to manually enter and modify both third-party and the landed cost that is generated for items with freight when the Post Freight Amount to Item check box is selected in Set Up PO Options. Additionally, landed cost transactions are now generated for items with freight on a purchase order line when the Post Freight Amount to Item check box is selected in Set Up PO Options.

- A new Landed Cost Transactions view has been added to the Explore menu that allows you to view landed cost lines, posted receipts, and purchase orders.

Sales Order Enhancements

You now have the ability to enter negative lines for noninventory items in Enter Sales Order and Quotes.

Upgrading from 7.30 to 7.40

This chapter describes the differences made between the 7.30 to 7.40 releases that you should be aware of. Installation and global changes are listed first followed by module changes and retirements.

Global Changes

Unit of Measure

- The entry of conversion factors and calculation of conversion factors is now modified to use higher precision, and users can now select the direction of the conversion factor. Previously, users could not select the direction of the conversion factor. These changes are now effective in Common Information Set Up Units of Measure and Maintain Non-Inventory Items, and in Inventory Management Maintain Items.
- In Common Information Maintain Non-Inventory Items and Inventory Management Maintain Items, if the unit of measure uses the standard conversion factor, that factor will now appear. Previously, when the Use Standard check box was selected, the conversion factor was displayed as a zero. In addition, the standard conversion factor now defaults when a new unit of measure is added to an item record.
- You can now import the units of measure for non-inventory items. Previously, only the units of measure for inventory records could be imported.
- You can now set the unit of measure when entering transfer orders in Enter Transfer Orders. Previously, all transfer orders used only the stock or base unit of measure.

Accounts Payable Changes

You can now post the freight amount to the general ledger account associated with the purchase item if the Post Freight to Item check box is selected in Set Up PO Options or Set Up AP Options. Previously, the voucher line freight amount posted to the incoming freight account associated with the shipping method.

Accounts Receivable Changes

- In Apply Payments and Memos, you can now apply a refund to any other type of transaction; previously, they could be applied only to credit memos. Also, the Show All Open Invoices check box has been renamed Show All Open Transactions.
- In Enter Cash Receipts, you can now apply refunds to both invoices and memos; previously, they could be applied only to memos. Also, the Show All Open Invoices check box has been renamed Show All Open Invoices and Memos.

Inventory Management Changes

- You can now maintain the primary vendor at the inventory if the Warehouse Replenishment Primary Vendor check box is clear in Maintain Inventory. Previously, the primary vendor was required when defining a warehouse replenishment record and could not be changed.
- You can now override the buyer and primary vendor during order generation when using inventory replenishment and override the buyer when using MRP. Previously, if the buyer and primary vendor were defined for the purchase product line for the inventory record, the assigned buyer and primary vendor were used for the suggested orders. Users can now change the primary vendor in Inventory Replenishment or the buyer and primary vendor in MRP on the suggested orders.
- In Process Replenishment Orders, you can now delete all suggested orders during the replenishment process. Previously, all orders would remain as suggested orders until an actual order was generated. Additionally, all but the Create Suggested Orders option are now disabled when no suggested orders exist.

- You can now specify manufacturing preferred bins, separate from distribution preferred bins, at the inventory item level. Previously, a list of preferred bins was defined for an inventory record and the preferred bins associated with the inventory record were used during the distribution process for all inventory transactions across both the distribution and manufacturing modules.
- In Set Up Landed Costs, you can now set up landed cost by receipt line or receipt total based on the new allocation method. Additionally, you can apply the landed cost to miscellaneous items, miscellaneous expenses, and assembled kits. Previously, you could assign landed cost only to finished goods and raw materials. Also, you can no longer apply landed cost to inventory purchase transactions.

Manufacturing Changes

Work Order Maintenance

A new option has been added in Work Order Maintenance to set a material or labor step to complete. Marking a material step complete when quantities remain relieves the quantity from the Quantity Required for Work Order field, thereby, adjusting the replenishment position and avoiding overstocking. Previously, a material or labor step was set to complete only during labor entry or material issue.

Set Up MF Options

The options to set the batch number for job completion, labor, progress jobs, material issues, outside issues, and other issues have been removed. Additionally, the option to create open batches for material issue, labor entry, progress entry, and job close has been removed. Batches are now automatically assigned during Post MF Transactions.

Post MF Transactions

To simplify the posting process for manufacturing transactions, a new Post MF Transactions task has been added to the Activities menu to replace the following tasks:

- Manufacturing Completion Journal
- Manufacturing Labor Journal
- Manufacturing Progress Journal
- Manufacturing Material/Outside/Other Journal
- WIP Labor Journal
- WIP Mat/Out/Other Journal
- WIP Progress Journal
- WIP Completion Journal
- WIP Batch Setup
- Labor Entry Log
- Material Issues Log
- Outside Issues Log
- Other Issues Log

Additionally, this new task allows you to select the transactions to post and uses the transaction date as the posting date.

Backflush from Bin Tracked Warehouse

In Manufacturing, you can now backflush a material/outside/other step from a bin tracked warehouse as long as the item is not lot or serial tracked. Previously, a material step could not be marked as a backflush step if the warehouse associated with the detail step was tracking quantity at the bin level.

Purchase Order Changes

- You can now post the freight amount to the general ledger account associated with the purchase item if the Post Freight to Item check box is selected in Set Up PO Options or Set Up AP Options. Previously, the line item freight amount posted to the incoming freight account associated with the shipping method.

- A new Enter Landed Cost window has been added to the Process Receipt of Goods task that allows you to manually enter and modify both third-party and the landed cost that is generated for items with freight when the Post Freight Amount to Item check box is selected. Additionally, landed cost transactions are now generated for items with freight on a purchase order line when the Post Freight Amount to Item check box is selected in Set Up PO Options.

Sales Order Changes

You now have the ability to enter negative lines for noninventory items in Enter Sales Order and Quotes.

System Manager Changes

In the Task Editor utility, the Task ID field no longer defaults to an ID that is reserved by Sage.

Retired Modules

eCustomer

The eCustomer module has been discontinued. If you have data for this module, you can no longer access them from Sage ERP MAS 500 after your upgrade. Your data for the discontinued module will remain on the server, allowing you to view them using the appropriate SQL Server tools.

eSalesforce

The eSalesforce module has been discontinued. If you have data for this module, you can no longer access them from Sage ERP MAS 500 after your upgrade. Your data for the discontinued module will remain on the server, allowing you to view them using the appropriate SQL Server tools.

LabelXpert



NOTE

To upgrade to the latest LabelXpert version, contact Scanco at: www.scanco.com

The LabelXpert module has been discontinued. If you have data for this module, you can no longer access them from Sage ERP MAS 500 after your upgrade. Your data for the discontinued module will remain on the server, allowing you to view them using the appropriate SQL Server tools.

Warehouse Automation



NOTE

To upgrade to the latest Warehouse Automation version, contact Scanco at: www.scanco.com

The Warehouse Automation module has been discontinued. If you have data for this module, you can no longer access them from Sage ERP MAS 500 after your upgrade. Your data for the discontinued module will remain on the server, allowing you to view them using the appropriate SQL Server tools.

Changes to Accounts Payable

This chapter describes the changes made to the Accounts Payable module.

Global Changes

The following change was made in version 7.40.

You can now post the freight amount to the general ledger account associated with the purchase item if the Post Freight to Item check box is selected in Set Up PO Options or Set Up AP Options. Previously, the voucher line freight amount posted to the incoming freight account associated with the shipping method.

Reports and Inquiries

The following change was made in version 7.30.

In the 1099 Forms task, all references to Magnetic Media have been renamed to Electronic Filing.

Chapter 4 *Changes to Accounts Payable*

Changes to Accounts Receivable

This chapter describes the changes made to the Accounts Receivable module.

Apply Payments and Memos

The following change was made in version 7.40.

In Apply Payments and Memos, you can now apply a refund to any other type of transaction; previously, they could be applied only to credit memos. Also, the Show All Open Invoices check box has been renamed Show All Open Transactions.

Enter Cash Receipts and Invoice Down Payment

The following change was made in version 7.40.

In Enter Cash Receipts, you can now apply refunds to both invoices and memos; previously, they could be applied only to memos. Also, the Show All Open Invoices check box has been renamed Show All Open Invoices and Memos.

The following change was made in version 7.30.

If the new Credit Card Processing module is activated, a customer's credit card information must be entered in the Credit Card Transactions task, and the fields on the Credit Card tab can only be viewed.

Chapter 5 *Changes to Accounts Receivable*

Changes to Business Insights

This chapter describes the changes to Business Insights.

Business Insights Dashboard

The following changes were made in version 7.20.

The new Business Insights Dashboard provides more robust and flexible capabilities offered with ASP .NET technology. The Dashboard is a Web site that provides you with the ability to view and customize key business data for the selected company. For information about installing the Business Insights Dashboard, refer to the *Sage ERP MAS 500 Internet Applications* guide.

- You can view Business Insights Explorer data, as well as set links to commonly used sites within the Dashboard Web site.
- You can create private or public Dashboards. Creating public Dashboards allows you to share key business data with other users in your company.
- The Business Insights Dashboard is available on all 7.20 systems; you do not have to purchase it separately. For more information, see the Help system or the new Business Insights Dashboard tutorials.

Chapter 6 *Changes to Business Insights*

Changes to Cash Management

This chapter describes the changes made to the Cash Management module.

Multiple Unposted Deposits

The following change was made in version 7.30.

Multiple unposted Cash Management deposits are now supported.

Chapter 7 *Changes to Cash Management*

Changes to Credit Card

This chapter describes the changes made to the Credit Card module.

Note to Current PSG Credit Card Users

The following changes were made in version 7.30.

The new Credit Card Processing module has greatly enhanced functionality compared to the Professional Services Group (PSG) module and delivers a more complete and secure credit card processing solution.

- There is no automatic conversion from PSG Credit Card to the version 7.30 Credit Card Processing module; there will be some configuration required. For example, you will need to set up processors and re-enter customer credit card information.
- Processors supported out of the box are Sage Payment Solutions and PayFlow Pro by PayPal. In contrast, the PSG version supported PCCharge and Sage Payment Solutions. If you are currently using PCCharge, you will need to either change processors or create a custom interface for PCCharge.

Chapter 8 *Changes to Credit Card*

Changes to Inventory Management

This chapter describes the changes made to the Inventory Management module.

Global Changes

The following changes were made in version 7.40.

- You can now maintain the primary vendor at the inventory if the Warehouse Replenishment Primary Vendor check box is clear in Maintain Inventory. Previously, the primary vendor was required when defining a warehouse replenishment record and could not be changed.
- You can now override the buyer and primary vendor during order generation when using inventory replenishment and override the buyer when using MRP. Previously, if the buyer and primary vendor were defined for the purchase product line for the inventory record, the assigned buyer and primary vendor were used for the suggested orders. Users can now change the primary vendor in Inventory Replenishment or the buyer and primary vendor in MRP on the suggested orders.
- You can now specify manufacturing preferred bins, separate from distribution preferred bins, at the inventory item level. Previously, a list of preferred bins was defined for an inventory record and the preferred bins associated with the inventory record were used during the distribution process for all inventory transactions across both the distribution and manufacturing modules.

Landed Costs

The following change was made in version 7.40.

In Set Up Landed Costs, you can now set up landed cost by receipt line or receipt total based on the new allocation method. Additionally, you can apply the landed cost to miscellaneous items, miscellaneous expenses, and assembled kits. Previously, you could only assign landed cost to finished goods and raw materials. Also, you can no longer apply landed cost to inventory purchase transactions.

Replenishment Orders

The following change was made in version 7.40.

In Process Replenishment Orders, you can now delete all suggested orders during the replenishment process. Previously, all orders would remain as suggested orders until an actual order was generated. Additionally, all but the Create Suggested Orders option are now disabled when no suggested orders exist.

Physical Count

The following changes were made in version 7.30.

The Inventory Physical Count process has been enhanced with significant workflow and user interface improvements.

- Grid entry functionality was added to the Enter Counts task.
 - Warning messages are also displayed for items with missing counts.

- In the Select Count Items task, there is expanded item selection criteria. You can also select individual list items to count, save count selection settings, and control the sort order of count items.
- In the Enter Counts task, you can now filter a list of count items, include counted or uncounted items (or both), enter counts directly into a grid, and edit batch information.

UPC Bar Codes Validation

The following change was made in version 7.30.

A new option has been added to Set Up IM Options to validate that a UPC bar code is unique to your company and is in numeric (0-9) format. The validation is performed in the Maintain Items and IM Import tasks, and the Inventory Items Assisted Company Setup (ACS) step in Data Migrator.

Chapter 9 *Changes to Inventory Management*

Changes to Manufacturing

This chapter describes the changes made to the manufacturing modules.

Work Order Maintenance

The following change was made in version 7.40.

A new option has been added in Work Order Maintenance to set a material or labor step to complete. Marking a material step complete when quantities remain relieves the quantity from the Quantity Required for Work Order field, thereby, adjusting the replenishment position and avoiding overstocking. Previously, a material or labor step was set to complete only during labor entry or material issue.

Backflush from Bin Tracked Warehouse

The following change was made in version 7.40.

In Manufacturing, you can now backflush a material/outside/other step from a bin tracked warehouse as long as the item is not lot or serial tracked. Previously, a material step could not be marked as a backflush step if the warehouse associated with the detail step was tracking quantity at the bin level.

Set Up MF Options

The following change was made in version 7.40.

The options to set the batch number for job completion, labor, progress jobs, material issues, outside issues, and other issues have been removed. Additionally, the option to create open batches for material issue, labor entry, progress entry, and job close has been removed. Batches are now automatically assigned during Post MF Transactions.

Post MF Transactions

The following change was made in version 7.40.

To simplify the posting process for manufacturing transactions, a new Post MF Transactions task has been added to the Activities menu to replace the following tasks:

- Manufacturing Completion Journal
- Manufacturing Labor Journal
- Manufacturing Progress Journal
- Manufacturing Material/Outside/Other Journal
- WIP Labor Journal
- WIP Mat/Out/Other Journal
- WIP Progress Journal
- WIP Completion Journal
- WIP Batch Setup
- Labor Entry Log
- Material Issues Log
- Outside Issues Log
- Other Issues Log

Additionally, this new task allows you to select the transactions to post and uses the transaction date as the posting date.

Renamed, Removed, and Moved Tasks

The following change was made in version 7.40.

The following tasks are now replaced with the Post MF Transactions task.

- WIP Labor Journal
- WIP Mat/Out/Other Journal
- WIP Progress Journal
- WIP Completion Journal
- WIP Batch Setup
- Labor Entry Log
- Material Issues Log
- Outside Issues Log
- Other Issues Log

Performance Improvements to Production Entry and Labor Entry

The following change was made in version 7.30.

Performance has been significantly improved in the Production Entry and Labor Entry tasks. By eliminating concurrency deadlocks, performance on these tasks has improved approximately 90 percent.

Chapter 10 *Changes to Manufacturing*

Changes to Project Accounting

This chapter describes the changes made to the Project Accounting module.

Global Changes

Microsoft Project Support

The following change was made in version 7.30.

Microsoft Project support has been discontinued with the retirement of the Microsoft Project Link module.

Reports and Inquiries

The following change was made in version 7.20.

In the GL Account Transactions view in Business Insights Explorer, project transactions are now listed in the Tran Type column as Project Debit, Project Credit, or Timesheet. You can also access the Misc. Project Transactions Inquiry or Timesheet Inquiry window by selecting Manage menu > View Source Transaction to view the related Project Accounting transaction information.

Time and Material Billing Method

The following change was made in version 7.20.

The new Bill Method field in the Accounts Payable Enter Vouchers window allows you to select the bill method for a time-and-material and/or fixed-price-plus noninventory line item in a project. The billing methods are standard price, standard cost, and actual cost.

The new Time and Material Billing Method field in the Set Up PA Options window allows you to select the default billing method to use for the time-and-material and fixed-price-plus projects invoiced in Enter Vouchers for noninventory items.

Chapter 11 *Changes to Project Accounting*

Changes to Purchase Order

This chapter describes the changes made to the Purchase Order module.

Global Changes

The following change was made in version 7.40.

You can now post the freight amount to the general ledger account associated with the purchase item if the Post Freight to Item check box is selected in Set Up PO Options or Set Up AP Options. Previously, the line item freight amount posted to the incoming freight account associated with the shipping method.

Drop Shipments

The following change was made in version 7.30.

If the new Credit Card Processing module is activated, drop shipments are now supported with credit card payments as they are released to the Accounts Receivable module for invoicing.

Landed Cost Changes

The following change was made in version 7.40.

A new Enter Landed Cost window has been added to the Process Receipt of Goods task that allows you to manually enter and modify both third-party and the landed cost that is generated for items with freight when the Post Freight Amount to Item check box is selected. Additionally, landed cost transactions are now generated for items with freight on a purchase order line when the Post Freight Amount to Item check box is selected in Set Up PO Options.

Chapter 12 *Changes to Purchase Order*

Changes to System Manager

This chapter describes the changes made to the System Manager module.

Task Editor Utility

The following change was made in version 7.40.

In the Task Editor utility, the Task ID field no longer defaults to an ID that is reserved by Sage.

Maintain Users

The following change was made in version 7.20.

You can set roles for users who will create, maintain, or run import jobs within the Data Import Manager module. These roles are established by selecting the DI Package User or DI Package Administrator check box for users. For more information, refer to the *Sage ERP MAS 500 Installation and System Configuration* guide.

Changes to Sales Order

This chapter describes the changes made to the Sales Order module.

Data Entry Changes

The following change was made in version 7.40.

You now have the ability to enter negative lines for noninventory items in Enter Sales Order and Quotes.

Shipment Commit Process

The following changes were made in version 7.30

Previously, shipments had to be committed before an invoice could be printed. The shipment commit process has been enhanced with the following features:

- The Edit Shipments task is enhanced with a new Invoiced status and the ability to generate, print, and view invoice details for a selected shipment.
- You can generate and print a pro-forma invoice prior to committing the shipment.
- You can now delete pending invoices before committing them.
- New security events control the ability to generate and delete pro-forma invoices prior to commit.
- You can enter and apply payments in the Process Sales Order and Edit Shipments tasks.
- Ready to Commit selection criteria was added to the Select Customer Shipment task.

Enter Payments

The following change was made in version 7.30.

If the new Credit Card Processing module is activated, a customer's credit card information must be entered in the Credit Card Transactions task, and the fields on the Credit Card tab can only be viewed.

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