eagle Consulting Group

* info

For Sage MAS 500

February 2006

What's Inside

Headline News

Sage MAS 500 was chosen as a **Top 100 Product for 2006** in the High-End and Mid-Market category by the editors of ***Accounting Today*** magazine.

Several other Sage Software products also joined Sage MAS 500 in this honor reported in the December 19-January 8 issue.

Customizer

See page 4 for more info!

Sage MAS 500 Purchase Order Module What It Can Do For You

Every company buys products and services, even if they do not resell those products or use them in a manufacturing process. You purchase office supplies, computer hardware and software, office furniture, employee gifts, magazine subscriptions, and a host of other products. You also purchase services such as tax preparation help, legal consulting, and temporary employment.

For manufacturers or distributors, the benefits of a purchase order tracking system are more obvious, but virtually every business can increase efficiency, improve cash forecasting abilities, monitor purchasing trends, and save time and money with the Sage MAS 500 Purchase Order module. Let's take a closer look.

Save time and gain control over internal requests for supplies or services with the Purchase Order module.

Integration Across Modules

As you would imagine, the Purchase Order module integrates with the Sage MAS 500 **Accounts Payable**, **Inventory Control**, and **General Ledger** modules. In addition, it integrates with the Sage MAS 500 **Project Accounting** module to assign costs for project materials and for automatic billing of materials.

If you are using the **Sage FAS Asset Accounting** module, you can record and track fixed asset purchases automatically through the Purchase Order module.

Manufacturers can assign a Purchase Order line to a specific Work Order, and generate planned and actual purchase orders through Material Requirements Planning.

Track Vendor Performance

Your time is valuable. Too valuable to waste on suppliers that overcharge or underdeliver. The Purchase Order module adds comprehensive vendor performance tracking features that allow you to capture key vendor performance metrics. This allows you to choose the most reliable partners to do business with.

The Sage MAS 500 Purchase Order module automatically tracks information about on-time deliveries, fulfillment quantity performance, and cost variances. You can note unauthorized substitutions, damaged goods, or improper labeling during receiving. The **Vendor Performance Report** lays out all of this data in an easy-to-understand format allowing you to make the best use of the data.

Continued on Page 2

Multicurrency Support

If you have implemented the Sage MAS 500 **Multicurrency Management** module, you may enter Purchase Order transactions in your vendors' currency. If the home currency differs from the currency on the purchase order, two order totals display, the first in the purchase order's currency, the second in your company's home currency.

Returns Made Easy

Returns are an inevitable part of the purchasing process. Using the Purchase Order module you can record the return of items quickly and efficiently. Select line item information from an existing purchase order to build your return item list, saving data entry time. You can assign a reason code to each return line, furthering your ability to monitor a vendor's performance. At any time, you can view the number of units received, returned for credit, and returned for replacement.

Informative Inquiries

As is true of other Sage MAS 500 modules, the Purchase Order module offers a number of informative inquiry screens allowing you to quickly uncover the data you're concerned with. Easily view order data, receipt data, requisitions, change orders, and returns, zeroing in on the precise answers. The **Business Insights Explorer** offers even more extensive inquiry capabilities, please see our article on page 3.

Multiple Location Purchasing

The procurement process is complicated when you're buying for more than one location or more than one business division. The Purchase Order module includes several features that can help. You can designate a separate ship-to address and shipping method for each line of a purchase order. If you prefer to create a separate purchase order for each location, a handy copy features allows you to copy data from a previous purchase order to a new one. You can even create purchase orders across multiple companies, saving you time and reducing the opportunity for error. Some reports, such as the **Expected Delivery Report**, allow you to view purchasing information for a specific target company or companies.

Change Order Processing

An important part of your accounting audit trail is tracking changes made to the documents you create. When changes are made to open purchase orders, you receive a prompt to generate a change order. Through security setup, you can determine which users are authorized to make changes. When you create a change order, you'll enter a reason for the change. The system keeps a record of all the changes made to a purchase order so you can report upon or inquire into those changes at any time.

Sales Orders To Purchase Orders

Much of your purchasing is in response to customer orders. With the Sage MAS 500 Purchase Order module, you can tie sales orders to purchase orders, speeding fulfillment for your priority customers.

Requisitions Add Control

Requisitions are often used as internal purchase orders. Your company is the vendor and your staff members are the customers. Using a requisition type of purchase order, you can efficiently chronicle the product and service requests of your staff. When the sales department needs a box of paper or the marketing department needs a floor mat, have them create a requisition.

You can also use requisitions to better coordinate the purchases for a single project or event. Use them to track all the new computer equipment you're planning to order, for example. Simply enter all the details of all the items you wish to order, regardless of the vendor you will ultimately purchase from. Later, you can create purchase orders for each vendor, assigning the lines from the requisition to each purchase order created.

Record the originator, contact, and department on each requisition to better organize and track this type of request. Only authorized buyers can turn your requisitions into purchase orders.

With requisitions you can eliminate the steady stream of verbal requests, efficiently track the requisitions, and expense the products to the department making the request.

Set Limits With Tolerances

The Purchase Order module includes the ability to establish a system of tolerances that increase the control you have over the purchasing process. You set up tolerance codes that define the tolerances, or parameters applied during receipt of goods and receipt of invoice processing.

For example, you might indicate an amount or percentage that the unit cost of a line item on a purchase order cannot exceed; or the percentage needed for Sage MAS 500 to automatically close the receipt line; or the maximum number of days earlier or later than the promised date that the shipment can be received.

Tolerance codes can be assigned to the purchase order as a whole and then individually by line item. The total purchase order tolerance defaults are controlled by Vendor, while the detailed line tolerances default from the Item file.

By establishing such tolerances and applying the tolerance codes to your purchase orders and the individual line items on your purchase orders, you create a tight purchasing system that fits the way you do business, and avoids many common problems and errors during the receipt process.

Tight Security

The Sage MAS 500 Purchase Order module incorporates sophisticated security features to ensure the security and accuracy of your data. As in other modules, you control which users have access to specific companies, menus, tasks, and security events. Further, you control which users can generate purchase orders, create change orders, and add or change tolerance codes. You can monitor and control buyers' spending limits and maintain a complete audit trail of your company's purchases. For each buyer you can assign a maximum authorization amount.

A Strong Performer

If your company is already utilizing Purchase Order for the products you resell or manufacture, expand the scope of its use to include all of the products and services you buy. If your company is not yet utilizing the Purchase Order module, consider incorporating this strong performer into your company's tool set. ★

Business Insights Explorer For Purchase Order

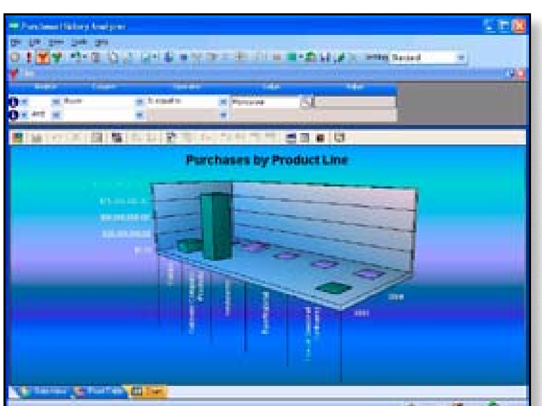
The new Business Insights Explorer module was added with the Version 7.0 release of Sage MAS 500 ERP. This exciting new module has the potential to dramatically improve the workflow and information exchange within a business.

In our main article in this issue of *info for Sage MAS 500, we presented some compelling reasons why your organization should consider using the Purchase Order module. An efficient purchasing process depends on current, reliable data about pending and received orders, returns, requisitions, and change orders. Business Insights Explorer can deliver this data effortlessly to your desktop and the desktops of others in your organization who need it.

In this article, we'll consider the unique benefits that the Business Insights Explorer (BIE) module lends to the purchasing process in an organization like yours.

Single Point Of Access

The BIE module provides centralized access to key data; no longer will you be required to visit a maintenance screen, call up an inquiry, and run a report to gather the various and detailed information you need concerning your purchases. This module lets you explore all purchasing-related data from a single point of access using detailed views, pivot tables, and colorful charts and graphs. During the day-to-day management of your purchase orders, you may want to know what orders are open for a particular vendor, what receipt activity has been recorded for a particular order, what buyer is responsible for the order, what change orders have been created, and so on. Without the BIE module you would need to visit several screens and perhaps generate a report to gather this data. With this module, you'll have ready access to all of this data and more from one location.



The Analyze option in BIE allows you to display Purchase Order data in the form of full color charts and graphs. In this example we see buyer purchase history by product line.

The ability to easily drill down to uncover transaction detail, and drill around to take a completely different view of the purchase process is part of the strength of the BIE module. For example, as you query a vendor's open purchase order, and notice one is overdue, drill down to get more information about that tardy order before you call the vendor. Who is the buyer? What receipt transactions have been logged against this order? Were there change orders associated? Were items invoiced at the correct cost? What other purchase orders are pending for this vendor? The BIE module allows you to uncover the information you need quickly and easily from a single point of access.

Using The BIE Module

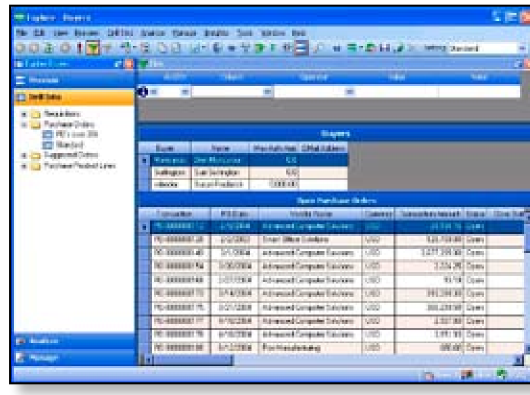
Whether you need to view purchasing data by Vendor, by Item, or by Buyer, you'll find that the BIE module presents your data in an intuitive, easy-to-navigate format arranged into **Preview**, **Explore**, **Analyze**, and **Manage** options.

Preview—The Preview option is a quick snapshot view of what's happening right now. From here you can view key information about a vendor, buyer, or purchase order, combined with related transaction header information such as open invoices or open orders for a specific vendor.

Explore—From the Explore option you are able to drill around into related vendor, purchase order, and item data. While exploring Purchase Orders, for example, you can view buyer information, receipt transactions, inventory transactions, change orders, and voucher lines.

Analyze—The Analyze option offers several ways to display and analyze purchasing data as graphs or charts. View item profitability or purchases by product line in the form of full color charts and graphs. Here too, you can drill down into the details behind the data presented.

Manage—The Manage option within the BIE module presents a list of common data entry tasks, saving you the step of navigating to these options. Create a new purchase order or requisition or perform vendor maintenance tasks without ever leaving the module.



The BIE Explore option allows you to drill down for additional detail. For example: Explore Buyers and drill down to open purchase orders for that buyer.

Customize Your View

While the BIE module offers dozens of views into your purchasing data, you also can create custom views of your data by dropping existing columns, adding new columns, renaming columns, and sorting and filtering the data within the grids to isolate just the records of interest to you. Creating these custom views is simple and requires no programming skills. Save your filtered and customized views for future use. For example, create a filter to show only orders for a specific Buyer or only orders with a receipt transaction in the current month.

Once you try the BIE module, it's likely to become an integral part of your workday. You may find you're able to accomplish all of your daily tasks conveniently within the module, saving time and increasing your efficiency. New BIE-user licensing options make sharing the power of the Business Insights Explorer module with your staff truly affordable. Call us for further information. ★

Spotlight On Sage MAS 500
Customizer

Too often, businesses are forced to adapt their work flow to their software, losing efficiency and increasing frustration along the way. When your software works the way you work, your productivity soars.

Do you find yourself *borrowing* fields to hold the data you want to track? Are you continuously tabbing through data entry fields that you don't use? Do you refer to your customers as clients and want your software to match? If the answer to any of these common questions is *yes*, the Sage MAS 500 Customizer module is the solution. The Customizer module is a unique tool that allows you to change standard screens and forms—even add new fields, without modifying the underlying source code. Let's take a closer look at what the Customizer module can do for you.

Add New Fields

The Customizer module enables you to add new fields and controls to virtually any Sage MAS 500 form. Various control types are supported including: label, text box, number, currency, frame, command button, check box, radio button, combo box, spin button, and a date control. For example, you could add a field for Referral Source or Industry SIC Code to the Customer Defaults page, a field for Catalog Code to the Sales Order Header, or Budget Manager to Maintain Accounts. Add a field that displays a value extracted from related tables, such as the sum of a customer's sales orders on the Maintain Customer form. Include your new fields on reports and import into and export out of them. This powerful feature adds tremendous flexibility and truly allows Sage MAS 500 to work the way you do.

Field Level Security

Create field level security by hiding particular fields from certain users or by adding validation logic to ensure the uniformity of the data entered. Make other fields view only to prevent changes. As an example, you may wish to disable entry into the customer control for On Hold for data entry clerks, but enable entry for the accounting staff.

Relabel, Rearrange, And Hide

Do you refer to your customers as *patients*? Your item numbers as *SKUs*? Relabel any field to suit the terminology of your business or to enable the field to serve another purpose.

Change the layout of any screen by moving fields to suit your data entry process. Speed the data entry process by designating or eliminating a field as a tab stop and setting the tab sequence for enterable fields. Highlight an important field with bold or different colored font. Change the screen background color for different companies to avoid confusion.

Customizations By User, Company, Group, Or Site

Every change you make using the Customizer module may be applied to a User and Company, a User, a Company, a Group, or the entire site. Customizer gives you total and complete control of the screens and functionality offered to each user of your system. It is easy to temporarily disable your customizations if necessary, or expand a particularly useful change to be available to all users.

Scripts Add High-Powered Functionality

Scripts can be used to perform a myriad of discrete functions. Imagine performing customized freight calculations, calculating new customer-specific discounts, defining a new commission structure, writing sales values to an Excel spreadsheet, or automatically creating new Outlook contacts by simply clicking a button within your Sage MAS 500 software.

You can create a script and tie that script to a custom toolbar button or control you've added, so that the script will run whenever the user presses the new button. Use this feature to add a button to launch another application such as the Windows Calculator, the UPS Web site, or your primary vendor's eCommerce site. You also can utilize scripting to control applications such as Microsoft Access or your legacy software via OLE (Object Linking and Embedding).

The Off-The-Shelf Custom Tool

The Customizer module provides functionality that expands and tailors the operation of Sage MAS 500, enabling you to streamline entry tasks, add new data fields, and even add highly specific calculations and procedures. If you haven't yet discovered Customizer, please give us a call for more information or a demonstration. ★

Contact

sage software Authorized Partner Select

Eagle Consulting Group

50 East 42nd Street
Suite 2301
New York, NY 10017

(212) 692-9393
(212) 953-2913 fax

Email:
info@eaglecg.com

Web Site:
www.eaglecg.com

More Info Click here for more information on products and services featured