

STAR-INFO

Newsletter for Sage ERP MAS 90 and 200

7330 Fern Avenue
Suite 202
Shreveport, LA 71105
318-213-0375
318-227-0324 fax
keith@ascgllc.com
www.ascgllc.com

Headline News

Sage North America announced the winners of its third annual Customer Awards Program. Six companies were recognized at the Sage Summit conference in Washington, DC. Selected by a panel of independent judges with extensive experience across the technology spectrum, the awards recognize the outstanding business achievements of customers using Sage products and services.

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Sales Order Enhancements

Version 4.5 Offers Extensive New Capabilities

The Version 4.5 release of Sage ERP MAS 90 and 200 is due out late this summer and is packed with new features designed to smooth your workday. In this article we take a closer look at the enhancements in the Sales Order module, including new capabilities in pricing, commissions, and lot/serial distribution, as well as additional flexibility in the integration between the Sales Order and Job Cost modules.

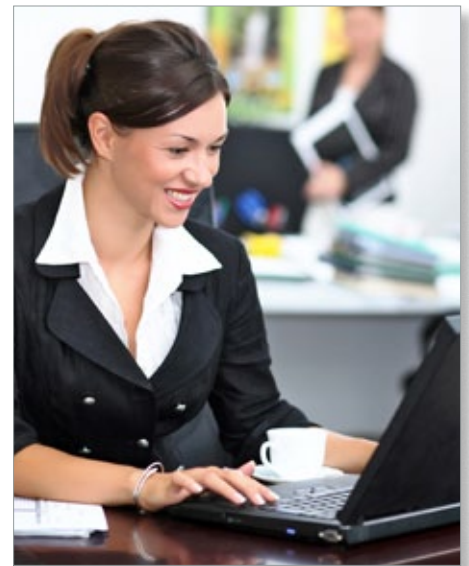
New Pricing Features

Price Level By Customer And Product Line

In Version 4.5 price levels by customer have been enhanced to allow you to establish default price levels for each customer by product line. This will make it easy to reward customers who purchase a large quantity of many items across a product portfolio, not just for a large quantity of an individual item. Because discounts can be pre-set by price code or by ship-to code, order entry staff will not be burdened with having to refer to additional documentation to determine the correct pricing discounts for customers. This enhancement makes it easier for you to reward your best customers and keep them loyal.

Pricing Flexibility For Total Item Quantities

Sage ERP MAS 90 and 200 always has had the capability to set discount pricing for large quantities of a specific item. In Version 4.5 you will be able to set discounts based on



both groupings of items and the item totals. Discounts can be based on the total of products in a product line, or the total for specific groups of products in a product category, or by the total sum quantity on the order.

This flexibility will be especially useful if your company offers many different colors and sizes of the same items. Perhaps you would like to run a special on widgets and widget accessories. You may stock the widgets in four different sizes and 10 colors. Accessories fall into six different product groups and number in the hundreds. Using Sage ERP MAS 90 Version 4.5, you would be able to discount the entire widget product line by 10 percent, set a 20 percent discount on two of the accessory item categories, and choose to discount the total order by an additional 5 percent if the total items ordered reach a certain level.

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Sales Order Enhancements

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The new Price Level By Customer and Item Pricing By Total Quantities features are enabled on the Line Entry tab of Sales Order Options.

Advanced Distribution Of Lot And Serial Numbers

With Version 4.5 of Sage ERP MAS 90, you will be able to assign specific lot or serial numbers when you first create a Sales Order, rather than when invoicing. This allows you to reserve specific lots for your best customers. Or, if a customer has ordered from one lot, and wants to reorder more from that same lot, you will easily be able to accommodate them. If, for example, a granite supplier sells different types, colors and grains, and allows their customers to choose a specific piece to be used for a remodeling project, that item can be reserved for that specific customer. The selected lot and serial numbers can be printed on the sales orders and picking sheets for more reliable processing and communication. The new Lot and Serial Number Distribution option is enabled on the Line Entry tab of Sales Order Options.

Greater Flexibility In Salesperson Commissions

Commission Rate Table By Salesperson, Customer, Item

A commission rate enhancement in Version 4.5 allows you to setup salesperson commission rates by any combination of salesperson, customer, item, and effective date. For organizations with different pricing tiers for specific customers, a large number of items, and with multi-tier commissions, these new commission rate tables will provide an automatic method for ensuring your salespeople are paid correctly. The rate tables are easily set up and revised through a new maintenance program. The rates you assign will override any commission rates setup for items in Item Maintenance, or the commission rate entered for the invoice.

Split Commissions By Customer

Currently in Sage ERP MAS 90 and 200 you can split commissions between two or more salespeople, such as inside and outside sales, or salesperson and sales manager. With the Version 4.5 release, the percentage splits and specified sales personnel can be set for each individual customer. After the default split commission has been set up for a customer, this commission split will default automatically, rather than having to enter this information each time a sales order or invoice is created for that customer. The new default split commission feature supports a primary salesperson plus up to four additional salespeople.

Enhanced Sales Order Integration With Job Cost

A series of new features within the Sales Order to Job Cost integration allows you to

specify how revenues and costs are posted to the G/L, and set Job Cost related defaults to save time in order entry. These capabilities are configured on a new Job Cost tab in Sales Order Options.

The new revenue and cost posting options are found in three areas. You can:

- Post Sales Order invoice costs to job costs, amounts only, or amounts and units.
- Have amounts update the Estimate fields in Job Cost.
- Choose to post drop-ship costs to Job Cost; the choices are Yes, No, and Purchase Order only.

With Version 4.5 you also can elect to include the job number and description in the G/L posting comment for work in process, cost of goods, revenue, and expense accounts.

New inventory-related options allow you to relieve inventory quantities using the Product Line G/L accounts for sales and cost of goods, rather than the Job Cost Job Type accounts, when entering items for jobs in Sales Order. You also can choose how sales kits will appear on job invoices.

Other new features give you more control in sales order and invoice entry. You can choose to validate that the customer entered is the correct one for the job. You can select which cost types can be used in Sales Order, and you can choose to automatically change the Job Status to Complete during invoicing in Sales Order. This is a useful feature if you only invoice jobs once. To further save time, you now can set a default cost code and cost type for a customer. Invoice History Inquiry now displays the full job number and description as well.

Give us a call with your questions, or to discuss your upgrade to Version 4.5 of Sage ERP MAS 90 or 200. ★