# Sage MAS 500 Office

**Build Strong Customer Relationships**

The Sage MAS 500 Office module helps you use the power of automation to build stronger, more lasting customer relationships through enhanced communications. It is a key component of Sage MAS 500 ERP.
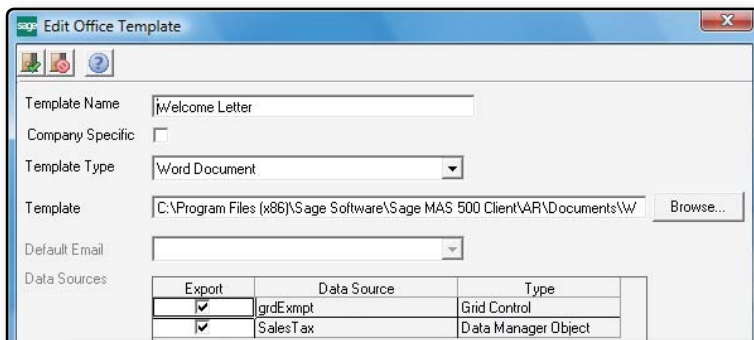
With Sage MAS 500 Office, you can use predefined, customizable templates to help you automatically (or manually) generate business communications that incorporate application data. You can save time while boosting productivity as you create a wide range of highly customized documents, including business letters, e-mails, or spreadsheets, without ever leaving Sage MAS 500.

Any authorized user in your organization can quickly and easily create a new template or one-time document without any programming knowledge. Simply open an existing Sage MAS 500 template, make any necessary modifications, and save the new template.

Through Sage MAS 500 Office, you can leverage familiar productivity tools to gain new efficiencies in business communications and customer service. For example, press a toolbar button on the Customer Maintenance screen or Business Insights Explorer customer inquiry, and Sage MAS 500 Office will launch Microsoft Word and populate a customized dunning letter with Sage MAS 500 data, including customer name, address, and aging information—all without you having to type a word! You can also use Sage MAS 500 spreadsheets as budget analysis tools to transfer business data from Sage MAS 500 tasks into Microsoft Excel for what-if analysis.



*◄ Modify standard templates or create custom templates to generate letters, e-mails, and spreadsheets that match your unique business needs.*
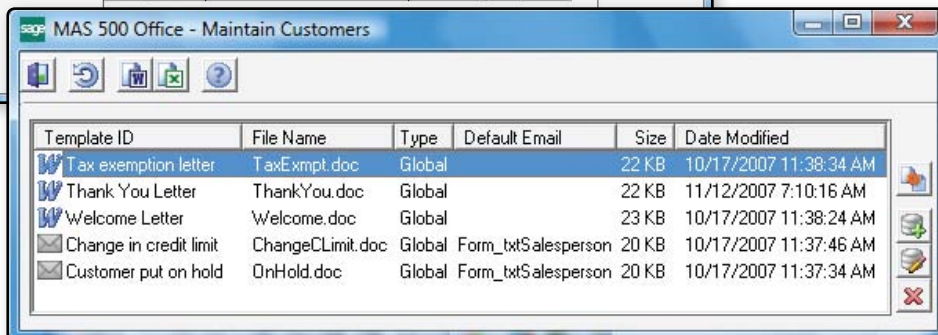
*▲ Sage MAS 500 Office has been implemented in all data entry tasks, so custom documents and spreadsheets can be generated effortlessly from any maintenance or transaction entry screen.*

## PREDEFINED TEMPLATES

New Customer Welcome Letter

Inactive Customer Letter

Accounts Receivable 30-day and 120-day Dunning Letters

Tax Exemption Letter

Customer Thank You Letter

Customer On Hold E-mail

Customer Change in Credit Limit E-mail

Customer Exceeded Credit Limit E-mail

Problem With Vendor Account Balance E-mail

Budget Planning Analysis Spreadsheet

Salesperson Sales History Analysis Spreadsheet

Customer Sales History Analysis Spreadsheet

Edit Commissions Spreadsheet

Customer Class History Analysis Spreadsheet

PO Matching Analysis Spreadsheet

Standard Journal Entry Spreadsheet

Transaction Journal Entry Spreadsheet

## SAGE MAS 500 SOLUTIONS

CRM and E-business

Financials and Project Accounting

Distribution and Manufacturing

Human Resources and Payroll

Customization and Integration

Business Intelligence

*"Sage MAS 500 has been a lifesaver for us. It's trimmed 20 percent off administration time, and will have paid for itself in a little over a year."*

*Kurt Gail, CFO – Central Distributors of Beer*

## Create New Templates

Create a wide choice of templates for your letters, e-mails, and spreadsheets.

• Create templates using a process as simple as dragging and dropping fields into your Word documents or export directly to Excel spreadsheets for formatting.

• Make templates available to all companies or a specific company.

## Generate Templates

Easily select existing templates and generate customized communications.

• Activate Office from the current Sage MAS 500 task to display a list of templates.

• Automatically generate the template with all appropriate information.
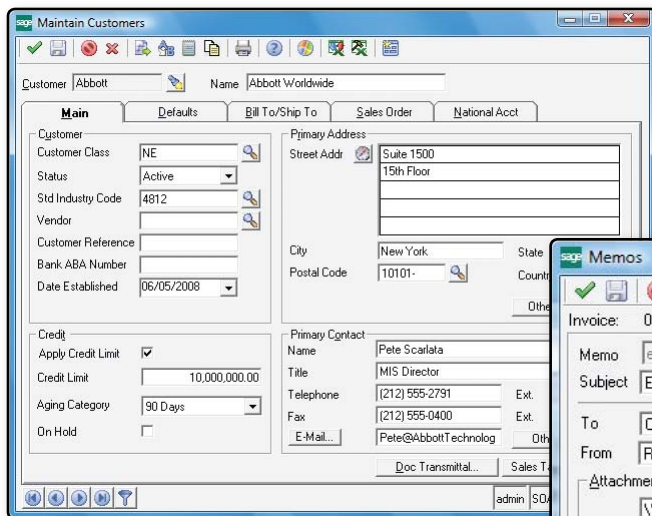
▲ *Attach any memo, file, or Internet address (URL) to an entity such as a customer, vendor, salesperson, or account.*

## Sage MAS 500 Office Functions

Facilitate the launch of frequently performed operations from the Sage MAS 500 Office toolbar.

• Generate Templates—to view or modify an existing document prior to printing.

• Print Template.

• Send Mail Note.

• Create New Templates.

• Add New Attachments.

• Display Data Objects—to paste Sage MAS 500 fields into a new or existing template.

## Easy Access to Documents

Leverage the Sage MAS 500 memo manager to attach a variety of files directly to Sage MAS 500 records.

• Attach any desktop file, including Word documents, Excel spreadsheets, scanned images, photos, drawings, notes, voice, and multimedia files, to any Sage MAS 500 masterfile or transaction record.

• Attach any file or Internet address (URL) to a Sage MAS 500 entity, such as a customer, vendor, salesperson, or account.

• Insert attachments at the transaction or masterfile level.

• Add an attachment and memo manager displays the attachment in a folder specific to the entity.

• View the document or file at any time.

• Associate, or attach, a scanned image of a signed contract to a vendor record, or an image of an invoice to a customer record.
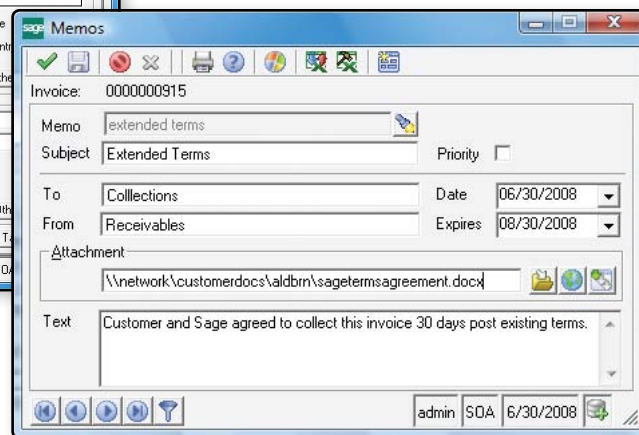
◄ *Memo manager allows you to easily attach any desktop file, including Word documents, spreadsheets, and images, to Sage MAS 500 transaction records or master files.*

**SAGE 360°**

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*Your business in mind.*