sage
software

Your business in mind.

SAGE MAS 500

BUSINESS INSIGHTS

Sage MAS 500 takes inquiry, drill-down, monitoring, and data analysis to a whole new level with out-of-the-box business intelligence tools including Business Insights Analyzer, Business Insights Explorer, Alerts, Crystal Reports®, Web Reports, and integration with desktop productivity tools.

REPORTING FEATURES

- Maintain custom layouts for printed forms.

- Tailor forms to your organization's design requirements.

- Export any report data to an external file. Data types supported include ASCII text, delimited, Excel, Lotus 1-2-3, XML, PDF, HTML, RTF, or Microsoft Word.

- Output any report to the screen, a printer, or a variety of file formats.

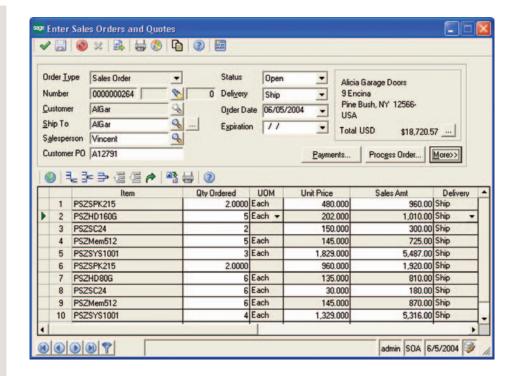- Create customized, presentation-quality reports through Crystal Reports software.

REPORTS

- Back Orders
- Aged Orders
- Change Orders
- Projected Sales
- Expected Shipments
- Sales Order Profitability
- Quote Expiration
- Blanket Orders
- Sales Orders
- Sales Order Status
- Open Sales Order Items
- Sales History
- Sales Analysis
- Drop Shipments
- Available To Ship
- Short Stock
- Tagged Orders

SAGE MAS 500 SOLUTIONS

- CRM and E-business
- Financials and Project Accounting
- Distribution and Manufacturing
- Human Resources and Payroll
- Customization and Integration
- Business Intelligence

Enhance Customer Service and Productivity

The Sage MAS 500 ERP Sales Order module helps you maximize productivity and increase customer satisfaction by improving efficiency throughout the sales process. This module is an integral part of the Sage MAS 500 distribution and manufacturing series, which has been designed with input from supply chain experts and customers in various wholesale distribution and manufacturing industries to meet the specific needs of businesses that stock, sell, ship, and manufacture products. Sage MAS 500 is a highly reliable, robust, and integrated series of business applications that delivers a flexible, scalable, and full-featured total e-business management solution.

The Sales Order module puts vital customer and inventory information at your fingertips to help keep your most critical business processes operating smoothly and efficiently. A set of powerful sales analysis tools takes the guesswork out of maintaining appropriate inventory levels, giving you critical data to help ensure that you have sufficient inventory to satisfy customers' expectations, while stocking the precise amount of each item to maximize profits and cash flow.

Customer service representatives can quickly and easily personalize the order entry screen by placing data elements they frequently access in a Favorites section. They can also quickly copy orders from previous orders and drill down to track a transaction, step-by-step, back to its original source. You can also track inventory item availability, pricing, lots, serial numbers, quantity pricing, specific customer pricing, costs, and customer credit limits. You can even establish a wide range of item- or customer-specific information at the sale order line, including shipping information, drop shipment requirements, commissions, account numbers, vital order dates, sales tax, and trade discount percentages.

With the Sage MAS 500 Sales Order module, the most complex, out-of-the-ordinary tasks can be performed quickly and conveniently — saving you time, money, and effort.

Sage MAS 500

Sales Order

> *"Today we use Sage MAS 500 for everything from order entry to royalty tracking and forecasting. The system has reduced our workflow in these areas by as much as 50 percent."*

Stacey O'Neill, Project Lead
Monsanto Choice Genetics, Inc.

System Options

Customize your entire sales function, including discounts, credit, taxes, commissions, kitting, and more.

- Assign trade discounts, payment term discounts, and credit limits for each customer.
- Check customer credit limits during Sales Order Entry and set limits for automatic release of orders from hold when credit picture changes.
- Create custom fields for the sales order and sales order line.
- Define default order entry layouts including fields to show/hide and popular tasks organized on a Favorites tab.
- Set up sales tax classes, codes, and schedules.
- Establish multiple sales commission plans, including split commissions.
- Organize kits to operate like regular items, then explode them when generating pick lists and invoices.
- Optionally track restocking charges to separate general ledger accounts.

Pricing, Discounting, and Promotions

Command the flexibility to define your pricing structure and price your inventory items for maximum profitability.

- Define pricing structures by customer type or warehouse location.
- Use the Multicurrency Management module to define default currencies for specific companies or warehouses.
- Manage sophisticated pricing models including contract pricing; price breaks based on quantity, monetary amount, weight, or volume; effective and expiration dates; and sales promotions.
- Pricing is maintained in the Inventory Management module. See the Sage MAS 500 Inventory Management specification sheet for more information about pricing, discounting, and promotions.

Sales Order Processing

Simplify and streamline workflow with some of the most powerful sales order processing tools in distribution software.

- Customizable grid entry for fast, heads-down data entry.
- Create and pick will call and over the counter orders directly from order entry.
- Enter payments during order entry or apply existing (posted) unapplied credit memos and cash receipts to invoices that will be created for the order being entered.
- Process customer returns and RMAs with ease. More details are provided on the RMA specification sheet.
- Automatically convert all types of sales quotations, for both current customers and prospects, into standard sales orders.
- Enter and process sales orders in any currency.
- Create orders for the sale and tracking of inventory, non-inventory, or special items.
- Establish shipment of individual line items to different locations on different dates, all on one sales order.
- Send order confirmations to customers.
- View the available and expected quantities of items and running totals online during Sales Order Entry.
- Look up sales order revisions and dates.
- Commit inventory during Sales Order Entry for a real time picture of quantity available.

- Attach reference codes, standardized comments, or free-form comments to sales orders and sales order lines.
- Record returns and generate credit memos in accounts receivable, if appropriate.

Blanket Orders

Make it easy to set up, maintain, and close blanket orders, reducing paperwork and maximizing efficiency.

- Use blanket orders to track and maintain customer contracts.
- Generate standard sales orders from a blanket order.
- Track releases against a blanket order.
- Support many types of contract situations.

Pick/Pack and Ship Options

Create an efficient workflow in your warehouse.

- Select and print picking lists by date, warehouse, transportation carrier, shipping priority, or other user-defined criteria.
- Use assisted picking to direct personnel to exact warehouse location for each item.
- Choose individual orders or groups of orders to be picked.
- Generate standard shipping documents, such as bills of lading and shipping labels, in addition to packing lists.
- Specify individual boxes within a shipment, allowing for a box-specific pack list and bills of lading.
- Track serial and lot information during the shipping process, in case a product recall or other event demands quick action.
- Leverage the Starship module for an integrated shipment processing and tracking solution.

Manufacturing Options

Additional features are available during Sales Order Entry when manufacturing modules are installed.

- Optionally explode configuration details or bills of materials on sales order and invoice.
- Run Capable To Promise inquiries directly from order entry.
- Launch MRP from order entry or quoting for order-specific material planning.
- Create and tag work orders to sales order lines.

Business Insights

Analyze and monitor Sales Order data and transactions including sales histories, shipment information, customer returns, and more.

- Organize, analyze, and graph sales history such as customer returns and sales by customer, by warehouse, by product line, and by item, as well as sales order profits.
- Use the Data Alerts module to monitor Sage MAS 500 when quotes are due to expire, when sales orders are placed for especially large dollar amounts, when a sales order line has a gross margin below a specific value, or when backordered inventory items are received at a warehouse. Alerts can be sent to any e-mail address to inform management, customer service, sales, shipping, and other employees about critical sales information.
- Built-in intelligence reports provide insight into sales order status, quantities available to ship, short stock, expected shipments, back orders, projected sales, customer returns, and sales history and analysis.

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